Palm Beach County
Board of County Commissioners

Agenda Item Summary

Meeting Date: June 4, 2024

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<tr>
<th>Department</th>
<th>Consent</th>
<th>Regular</th>
<th>Ordinance</th>
<th>Public Hearing</th>
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Submitted By: TOURIST DEVELOPMENT COUNCIL
Submitted For: TOURIST DEVELOPMENT COUNCIL

I. Executive Brief

Motion and Title: Staff recommends motion to approve: an Agreement between Palm Beach County and Conventions, Sports, Leisure International, LLC (CSL), for the development of a tourism master plan from June 24, 2024 through June 24, 2026, in the amount of $550,536.00.

Summary: On February 8, 2024, the Tourist Development Council (TDC) approved an allocation of $550,536 from tourism development tax dollars earmarked for special projects to develop a twenty-year tourism master plan. Tourism-related activities provide over 90,000 jobs and an estimated $10 Billion to Palm Beach County's economy. A tourism master plan will provide a framework and strategy to maintain and grow tourism in Palm Beach County. This agreement will provide the professional services necessary to complete resident and stakeholder engagement, destination assessment (inclusive of diversity, equity, inclusion and accessibility), destination sustainability, visioning workshops and recommendations to place Palm Beach County at the forefront of tourists' minds when deciding to visit south Florida. The request for proposals (RFP) for the development of a tourism master plan was advertised on August 3, 2023. Three proposals were received in response to the competitive solicitation. The selection committee met on October 20, 2023 and November 27, 2023, and recommended award to CSL. The Agreement was procured under the requirements of the Equal Business Opportunity Ordinance. On May 3, 2023, the Goal Setting Committee established a 15% preference Small Business Enterprise (SBE) contracting goal as the Affirmative Procurement Initiative (API). None of the respondents met this preference. Countywide (YBH)

Background and Justification: On April 12, 2018, the TDC approved the allocation of $250,000, for the creation of master tourism plan to provide a roadmap for tourism growth over the next twenty years. This project was stalled due to the COVID-19 pandemic and was revisited in 2023. On February 8, 2024, the TDC reaffirmed their commitment to development of a tourism master plan and approved an allocation of $550,536 towards implementation of the initiative. This agreement is now being submitted to the Board of County Commissioners for approval.

Attachments:
1.e Agreement with Conventions, Sports, Leisure International, LLC, with Exhibits A, B, and COIE
2.e Presentation

Recommended by: [Signature] Date: 5/2/24

Approved By: [Signature] Date: [Signature] Date:

County Administrator
II. FISCAL IMPACT ANALYSIS

A. Five Year Summary of Fiscal Impact:

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<th>Fiscal Years</th>
<th>2024</th>
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<td>Capital Expenditures</td>
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<td>Operating Costs</td>
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<td>External Revenues</td>
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<td>NET FISCAL IMPACT</td>
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# ADDITIONAL FTE POSITIONS (Cumulative)

Is Item Included in Current Budget? Yes X No __

Does this item include the use of federal funds? Yes ______ No X

Is this Item using State Funds? Yes ____ No X

Budget Account No.: Fund 1452 Dept 710 Unit 7310 Object 3401

Reporting Category ________

B. Recommended Sources of Funds/Summary of Fiscal Impact:

C. Department Fiscal Review:

REVIEW COMMENTS

A. OFMB Fiscal and/or Contract Administration Comments:

OFMB ____________ Contract Dev. and Control

B. Approved as to form and Legal Sufficiency:

Assistant County Attorney

C. Approved as to Terms and Conditions:

Department Director

This summary is not to be used as a basis for payment.
CONTRACT FOR
Tourism Master Plan Consultant
(Contract No. 23-104/LAC)

This Contract No. 23-104/LAC is made as of this _____ day of ________, 2024, by and between Palm Beach County, a political subdivision of the State of Florida, by and through its Board of Commissioners, hereinafter referred to as the COUNTY, and Conventions, Sports, Leisure International LLC, a limited liability company, authorized to do business in the State of Florida, hereinafter referred to as the CONTRACTOR.

In consideration of the mutual promises contained herein, the COUNTY and the CONTRACTOR agree as follows:

ARTICLE 1 - SERVICES

The CONTRACTOR's responsibility under this Contract is to develop a tourism master plan to the Tourism Development Council in accordance with Exhibit A, Scope of Work/Services, and Exhibit B, CONTRACTOR's proposal dated September 5, 2023 both of which are attached hereto and incorporated herein.

The COUNTY's representative/liaison during the performance of this Contract shall be Emanuel Perry, Director of Tourist Development Council, telephone number (561) 233-3066 or designee.

The CONTRACTOR's representative/liaison during the performance of this Contract shall be Richard Cutting-Miller, Vice President, Tourism Strategy, telephone number (646) 338-0300.

ARTICLE 2 - ORDER OF PRECEDENCE

Conflicting provisions hereof, if any, shall prevail in the following descending order of precedence: (1) the provisions of the Contract, including Exhibits A and C; (2) the provisions of RFP No. 23-104/LAC and all Amendments thereto, which are incorporated into and made a part of this Contract; (3) Exhibit B, CONTRACTOR's proposal dated September 5, 2023; and (4) all other documents, if any, cited herein or incorporated herein by reference.

ARTICLE 3 - SCHEDULE

The CONTRACTOR shall commence services on June 24, 2024 and complete all services by June 26, 2026.

Reports and other items shall be delivered and/or completed in accordance with Exhibit A.
ARTICLE 4 - PAYMENTS TO CONTRACTOR

A. The total amount to be paid by the COUNTY under this Contract for all services and materials shall not exceed a total contract amount of Five Hundred Fifty Thousand Dollars and no cents ($550,536.00). Paid in four (4) phases as follows: Phase 1: One Hundred Thirty-Seven Thousand Six Hundred Thirty Four Dollars and no cents ($137,634.00) includes completion of Project Kick-off & Project Planning, Initial Steering Committee Workshop and Leveraging Important Plans & Research. Phase 2: One Hundred Thirty-Seven Thousand Six Hundred Thirty Four Dollars and no cents ($137,634.00) includes completion of Stakeholder & Resident Engagement, Destination Benchmarking, Destination Branding, Marketing, & Messaging Assessment. Phase 3: One Hundred Thirty-Seven Thousand Six Hundred Thirty Four Dollars and no cents ($137,634.00) includes completion of Destination Assessment – Diversity, Equity, Inclusion, & Accessibility, Destination Assessment - Sustainability, Situational Analysis, Visioning Workshops & Draft Recommendations. Phase 4: One Hundred Thirty-Seven Thousand Six Hundred Thirty Four Dollars and no cents ($137,634.00) includes completion of Implementation Plan Delivered and Tourism Master Plan Delivered.

The CONTRACTOR shall notify the COUNTY’s representative, in writing, when ninety percent (90%) of the "not-to-exceed amount" has been reached. The CONTRACTOR will bill the COUNTY upon completion of each Phase. Where incremental billings for partially completed items are permitted, the total billings shall not exceed the estimated percentage of completion as of the billing date.

B. CONTRACTOR shall send ALL ORIGINAL invoices to: PALM BEACH COUNTY FINANCE DEPT., P.O. BOX 4036, WEST PALM BEACH, FL 33402-4036, with a copy to the COUNTY’s representative. Invoices received from the CONTRACTOR pursuant to this Contract will be reviewed and approved by the COUNTY’s representative, indicating that services have been rendered in conformity with the Contract. Approved invoices will be sent to the Finance Department for payment. Invoices will normally be paid within thirty (30) days following approval by the COUNTY’s representative. Invoices submitted on carbon paper shall not be accepted. In order for the COUNTY to make payment, the CONTRACTOR must ensure that the following information included on Appendix B, Business Information, of Exhibit _, CONTRACTOR’s proposal, must be exactly the same as it appears on the invoice and in the COUNTY’s Vendor Self Service (VSS) System, which can be accessed at https://pbcvssp.co.palm-beach.fl.us/webapp/vssp/AltSelfService: Vendor’s Legal Name, Vendor’s Address, and Vendor’s TIN/FEIN Number.

D. Final Invoice: In order for both parties herein to close their books and records, the CONTRACTOR will clearly state "final invoice" on the CONTRACTOR’s final/last billing to the COUNTY. This shall constitute CONTRACTOR’s certification that all services have been properly performed and all charges and costs have been
invoiced to the COUNTY. Any further charges, if not properly included on this final invoice, are waived by the CONTRACTOR.

E. In order to do business with Palm Beach County, CONTRACTORS are required to create a Vendor Registration Account OR activate an existing Vendor Registration Account through the Purchasing Department's Vendor Self Service (VSS) System, which can be accessed at https://pbcvssp.co.palm-beach.fl.us/webapp/vssp/AltSelfService. If CONTRACTOR intends to use subcontractors/subconsultants, CONTRACTOR must also ensure that all subcontractors/subconsultants are registered as contractors/consultants in VSS. All subcontractor/subcontractor agreements must include a contractual provision requiring that the subcontractor/subconsultant register in VSS. COUNTY will not finalize a contract award until the COUNTY has verified that the CONTRACTOR and all of its subcontractors/subconsultants are registered in VSS.

ARTICLE 5 - PALM BEACH COUNTY OFFICE OF THE INSPECTOR GENERAL AUDIT REQUIREMENTS

Pursuant to Palm Beach County Code, Section 2-421 - 2-440, as amended, Palm Beach County's Office of Inspector General is authorized to review past, present and proposed COUNTY contracts, transactions, accounts, and records. The Inspector General's authority includes, but is not limited to, the power to audit, investigate, monitor, and inspect the activities of entities contracting with the COUNTY, or anyone acting on their behalf, in order to ensure compliance with contract requirements and to detect corruption and fraud. Failure to cooperate with the Inspector General or interfering with or impeding any investigation shall be a violation of Palm Beach County Code, Section 2-421 - 2-440, and punished pursuant to Section 125.69, F.S., in the same manner as a second degree misdemeanor.

ARTICLE 6 - TRUTH-IN-NEGOTIATION CERTIFICATE/MOST FAVORED CUSTOMER

Signature of this Contract by the CONTRACTOR shall also constitute the execution of a truth-in-negotiation certificate certifying that the wage rates, over-head charges, and other costs used to determine the compensation provided for in this Contract are accurate, complete, and current as of the date of the Contract and no higher than those charged the CONTRACTOR's most favored customer for the same or substantially similar service. The said rates and costs may be adjusted to exclude any significant sums should the COUNTY determine that the rates and costs were increased due to inaccurate, incomplete, or noncurrent wage rates or due to inaccurate representation(s) of fees paid to outside contractors. The COUNTY shall exercise its rights under this Article 6 within three (3) years following final payment.

Furthermore, the CONTRACTOR warrants that the price(s) may not exceed the CONTRACTOR's price(s) extended to its most favored customer for the same or similar goods or services in similar quantities, or the current market price, whichever is lower. In
the event the CONTRACTOR offers more favorable pricing to one of its customer(s), the CONTRACTOR may extend to the COUNTY the same pricing or the then current market price, whichever is lower.

ARTICLE 7 - TERMINATION

A. This Contract may be terminated by the CONTRACTOR upon sixty (60) days prior written notice to the COUNTY in the event of substantial failure by the COUNTY to perform in accordance with the terms of this Contract through no fault of the CONTRACTOR.

B. This Contract may also be terminated, in whole or in part, by the COUNTY, with cause on five (5) business days written notice to the CONTRACTOR or without cause upon ten (10) business days written notice to the CONTRACTOR. Unless the CONTRACTOR is in breach of this Contract, the CONTRACTOR shall be paid for services rendered to the COUNTY’s satisfaction through the date of termination.

C. After receipt of a Termination Notice, except as otherwise directed by the COUNTY, in writing, the CONTRACTOR shall:

1. Stop work on the date and to the extent specified.

2. Terminate and settle all orders and subcontracts relating to the performance of the terminated work.

3. Transfer all work in process, completed work, and other materials related to the terminated work to the COUNTY.

4. Continue and complete all parts of the work that have not been terminated.

ARTICLE 8 - PERSONNEL

The CONTRACTOR represents that it has, or will secure at its own expense, all necessary personnel required to perform the services under this Contract. Such personnel shall not be employees of or have any contractual relationship with the COUNTY.

All of the services required hereunder shall be performed by the CONTRACTOR, or under its supervision, and all personnel engaged in performing the services shall be fully qualified and, if required, authorized or permitted under state and local law to perform such services.

Any changes or substitutions in the CONTRACTOR’s key personnel, as may be listed in Exhibit B, CONTRACTOR’s proposal, attached hereto and incorporated herein, must be made known to the COUNTY's representative before said change or substitution can become effective.
The CONTRACTOR warrants that all services shall be performed by skilled and competent personnel to the highest professional standards in the field.

All of the CONTRACTOR's personnel (and all subcontractors) will comply with all COUNTY requirements governing conduct, safety, and security while on COUNTY premises.

ARTICLE 9 - CRIMINAL HISTORY RECORDS CHECK

The CONTRACTOR, CONTRACTOR's employees, subcontractors of CONTRACTOR and employees of subcontractors shall comply with Palm Beach County Code, Section 2-371 – 2-377, the Palm Beach County Criminal History Records Check Ordinance ("Ordinance"), for unescorted access to critical facilities ("Critical Facilities") or criminal justice information facilities ("CJI Facilities") as identified in Resolutions R-2013-1470 and R-2015-0572, as amended. The CONTRACTOR is solely responsible for understanding the financial, schedule, and/or staffing implications of this Ordinance. Further, the CONTRACTOR acknowledges that its Contract price includes any and all direct or indirect costs associated with compliance with this Ordinance, except for the applicable FDLE/FBI fees that shall be paid by the COUNTY.

This Contract may include sites and/or buildings which have been designated as either "critical facilities" or "criminal justice information facilities" pursuant to the Ordinance and above referenced Resolutions, as amended. COUNTY staff representing the COUNTY department will contact the CONTRACTOR(s) and provide specific instructions for meeting the requirements of this Ordinance. Individuals passing the background check will be issued a badge. The CONTRACTOR shall make every effort to collect the badges of its employees and its subcontractors' employees upon conclusion of the contract and return them to the COUNTY. If the CONTRACTOR or its subcontractor(s) terminates an employee who has been issued a badge, the CONTRACTOR must notify the COUNTY within two (2) hours. At the time of termination, the CONTRACTOR shall retrieve the badge and shall return it to the COUNTY in a timely manner.

The COUNTY reserves the right to suspend the CONTRACTOR if the CONTRACTOR: 1) does not comply with the requirements of County Code Section 2-371 – 2-377, as amended; 2) does not contact the COUNTY regarding a terminated CONTRACTOR employee or subcontractor employee within the stated time; or 3) fails to make a good faith effort in attempting to comply with the badge retrieval policy.

ARTICLE 10 - SUBCONTRACTING

The COUNTY reserves the right to accept the use of a subcontractor, or to reject the selection of a particular subcontractor, and to inspect all facilities of any subcontractors in order to make a determination as to the capability of the subcontractor to perform properly under this Contract. The CONTRACTOR is encouraged to seek additional small business enterprises (SBEs) for participation in subcontracting opportunities. If the
CONTRACTOR uses any subcontractors on this project, the following provisions of this Article shall apply:

A. If the CONTRACTOR uses subcontractors, CONTRACTOR must ensure that all subcontractors are registered as vendors in the COUNTY’s Vendor Self Service System. All subcontractor agreements must include a contractual provision requiring that the subcontractor register in the COUNTY’s Vendor Self Service System.

B. If a subcontractor fails to perform or make progress, as required by this Contract, and it is necessary to replace the subcontractor to complete the work in a timely fashion, the CONTRACTOR shall promptly do so, subject to acceptance of the new subcontractor by the COUNTY.

ARTICLE 11 - EQUAL BUSINESS OPPORTUNITY PROGRAM COMPLIANCE - PENALTIES

It is the policy of the Board of County Commissioners that all segments of its business population including, but not limited to, small, local, minority and women owned businesses, have an equitable opportunity to participate in the COUNTY’s procurement process, prime contract and subcontract opportunities. In pursuance of that policy, the Board of County Commissioners adopted an Equal Business Opportunity (EBO) Ordinance which is codified in Sections 2-80.20 through 2-80.30 (as may be amended) of the Palm Beach County Code. The EBO Ordinance sets forth the COUNTY’s requirements for the EBO program, and is incorporated herein and made part of this Contract. Non-compliance with the EBO Ordinance must be corrected within fifteen (15) days of notice of non-compliance. Failure to comply with the EBO Ordinance may result in any of the following penalties:

- Suspension of Contract;
- Withholding of funds;
- Termination of the Contract based upon a material breach of contract pertaining to the EBO Program compliance;
- Suspension or debarment of CONTRACTOR from eligibility for providing goods or services to the COUNTY for a period not to exceed three (3) years; and
- Liquidated damages equal to the difference in dollar value of S/M/WBE participation as committed to in the Contract, and the dollar value of S/M/WBE participation as actually achieved, if applicable.

The CONTRACTOR must adhere to the Affirmative Procurement Initiatives (APIs), if any, as incorporated herein as Exhibit C. Failure to comply with this Article 11 is a material breach of this Contract.

i. CONTRACTOR shall report all subcontractor payment information on EBO Schedules 3(A) and 4, or as otherwise required by EBO, and, when the EBO portal is available, input subcontractor payment information directly into the COUNTY’s contract management system.
CONTRACTOR shall pay subcontractors undisputed amounts within ten (10) days after COUNTY pays the CONTRACTOR. In the event of a disputed invoice, the CONTRACTOR shall send the subcontractor(s) and COUNTY a written notice of the dispute within five (5) days after receipt of the subject invoice.

ii. CONTRACTOR must notify the Office of EBO of changes in S/M/WBE utilization and get prior approval for any substitutions.

The CONTRACTOR agrees to pay its subcontractors/subconsultants in compliance with the Florida Prompt Payment Act. In the event CONTRACTOR fails to comply with payments(s) to its subcontractors/subconsultants in accordance with the Florida Prompt Payment Act, CONTRACTOR shall be subject to any and all penalties and sanctions available under the terms of the EBO Program, its contract with the COUNTY, or any other applicable law.

The Office of EBO has the right to review CONTRACTOR’s records and interview subcontractors/subconsultants.

Failure to comply with this Article 11 is a material breach of this Contract.

ARTICLE 12 - FEDERAL AND STATE TAX

The COUNTY is exempt from payment of Florida State Sales and Use Taxes. The COUNTY will provide an exemption certificate submitted by the CONTRACTOR. The CONTRACTOR shall not be exempted from paying sales tax to its suppliers for materials used to fulfill contractual obligations with the COUNTY, nor is the CONTRACTOR authorized to use the COUNTY's Tax Exemption Number in securing such materials.

The CONTRACTOR shall be responsible for payment of its own and its share of its employees' payroll, payroll taxes, and benefits with respect to this Contract.

ARTICLE 13- AVAILABILITY OF FUNDS

The COUNTY’s performance and obligation to pay under this Contract is contingent upon an annual appropriation by the Board of County Commissioners for subsequent fiscal years.

ARTICLE 14 - INSURANCE REQUIREMENTS

Prior to execution of this Contract, the CONTRACTOR shall provide evidence of the following minimum required insurance coverage and limits (such as through a Certificate of Insurance) to COUNTY, c/o Purchasing Department, 50 South Military Trail, Suite 110, West Palm Beach, FL 33415, Attention: Lynn Clavette, Purchasing Manager, until otherwise notified by the COUNTY.
The CONTRACTOR shall maintain at its sole expense, in force and effect, at all times during the term of this Contract, insurance coverage and limits (including endorsements) as described herein. Failure to maintain the required insurance shall be considered default of the Contract. The requirements contained herein, as well as COUNTY’s review or acceptance of insurance maintained by CONTRACTOR, are not intended to and shall not in any manner limit or qualify the liabilities and obligations assumed by CONTRACTOR under the Contract. CONTRACTOR agrees to notify the COUNTY at least ten (10) days prior to cancellation, non-renewal or material change to the required insurance coverage. Where the policy allows, coverage shall apply on a primary and non-contributory basis.

A. **Commercial General Liability:** CONTRACTOR shall maintain Commercial General Liability at a limit of liability not less than $500,000 Each Occurrence. Coverage shall not contain any endorsement(s) excluding Contractual Liability or Cross Liability.

B. **Additional Insured Clause:** The Commercial General Liability policy shall be endorsed to include, “Palm Beach County Board of County Commissioners” as an Additional Insured. A copy of the endorsement shall be provided to COUNTY upon request.

C. **Business Auto Liability:** CONTRACTOR shall maintain Business Auto Liability at a limit of liability not less than $500,000 Each Occurrence for all owned, non-owned, and hired automobiles. In the event CONTRACTOR owns no automobiles, the Business Auto Liability requirement shall be amended allowing CONTRACTOR to maintain only Hired & Non-Owned Auto Liability and shall provide either an affidavit or a letter on company letterhead signed by the CONTRACTOR indicating either the CONTRACTOR does not own any vehicles, and if vehicles are acquired throughout the term of the Contract, CONTRACTOR agrees to purchase “Owned Auto” coverage as of the date of acquisition. This amended requirement may be satisfied by way of endorsement to the Commercial General Liability, or separate Business Auto coverage form.

D. **Workers’ Compensation Insurance & Employer’s Liability:** CONTRACTOR shall maintain Workers’ Compensation & Employer’s Liability in accordance with Florida Statute Chapter 440.

E. **Professional Liability:** CONTRACTOR shall maintain Professional Liability, or equivalent Errors & Omissions Liability, at a limit of liability not less than $1,000,000 Per Occurrence. When a self-insured retention (SIR) or deductible exceeds $10,000, COUNTY reserves the right, but not the obligation, to review and request a copy of CONTRACTOR’s most recent annual report or audited financial statement. For policies written on a “Claims-Made” basis, CONTRACTOR warrants the Retroactive Date equals or preceded the effective date of this Contract. In the event the policy is canceled, non-renewed, switched to an Occurrence Form, retroactive date advanced, or any other event triggering the
right to purchase a Supplement Extended Reporting Period (SERP) during the life of this Contract, CONTRACTOR shall purchase a SERP with a minimum reporting period not less than three (3) years. The requirement to purchase a SERP shall not relieve the CONTRACTOR of the obligation to provide replacement coverage. The Certificate of Insurance providing evidence of the purchase of this coverage shall clearly indicate whether coverage is provided on an “occurrence” or “claims - made” form. If coverage is provided on a “claims - made” form the Certificate of Insurance must also clearly indicate the “retroactive date” of coverage.

F. **Waiver of Subrogation:** CONTRACTOR hereby waives any and all rights of Subrogation against the COUNTY, its officers, employees and agents for each required policy. When required by the insurer, or should a policy condition not permit an insured to enter into a pre-loss agreement to waive subrogation without an endorsement, then CONTRACTOR shall notify the insurer and request the policy be endorsed with a Waiver of Transfer of Rights of Recovery Against Others, or its equivalent. This Waiver of Subrogation requirement shall not apply to any policy which includes a condition to the policy specifically prohibiting such an endorsement or voids coverage should CONTRACTOR enter into such an agreement on a pre-loss basis.

G. **Certificates of Insurance:** Prior to each subsequent renewal of this Contract, within forty-eight (48) hours of a request by COUNTY, and subsequently, prior to expiration of any of the required coverage throughout the term of this Agreement, the CONTRACTOR shall deliver to the COUNTY a signed Certificate(s) of Insurance evidencing that all types and amounts of insurance coverage required by this Contract have been obtained and are in force and effect. The Certificate Holder shall read:

Palm Beach County Board of County Commissioners
Insurance Compliance
PO Box 100085 - DX
Duluth, GA 30096

H. **Umbrella or Excess Liability:** If necessary, CONTRACTOR may satisfy the minimum liability limits required above for Commercial General Liability and Business Auto Liability under the Umbrella or Excess Liability policy. There is no minimum Per Occurrence limit of liability under the Umbrella or Excess Liability policy; however, the Annual Aggregate limit shall not be less than the highest “Each Occurrence” limit for either Commercial General Liability or Business Auto Liability. CONTRACTOR agrees to endorse COUNTY as an “Additional Insured” on the Umbrella or Excess Liability policy, unless the Certificate of Insurance notes the Umbrella or Excess Liability provides coverage on a pure/true “Follow-Form” basis.

I. **Right to Revise or Reject:** COUNTY, by and through its Risk Management Department in cooperation with the contracting/monitoring department, reserves
the right to review, modify, reject, or accept any required policies of insurance, including limits, coverages, or endorsements, herein from time to time throughout the term of this Contract. COUNTY reserves the right, but not the obligation, to review and reject any insurer providing coverage because of its poor financial condition or failure to operate legally.

ARTICLE 15 - INDEMNIFICATION

CONTRACTOR shall protect, defend, reimburse, indemnify and hold COUNTY, its agents, employees and elected officials harmless from and against any and all claims, liability, loss, expense, cost, damages, or causes of action of every kind or character, including attorney's fees and costs, whether at trial or appellate levels or otherwise, arising during and as a result of their performance of the terms of this Contract or due to the acts or omissions of CONTRACTOR.

ARTICLE 16 - SUCCESSORS AND ASSIGNS

The COUNTY and the CONTRACTOR each binds itself and its partners, successors, executors, administrators and assigns to the other party of this Contract and to the partners, successors, executors, administrators and assigns of such other party, in respect to all covenants of this Contract. Except as above, neither the COUNTY nor the CONTRACTOR shall assign, sublet, convey, or transfer its interest in this Contract, without the prior written consent of the other. Nothing herein shall be construed as creating any personal liability on the part of any officer or agent of the COUNTY, nor shall it be construed as giving any rights or benefits hereunder to anyone other than the COUNTY and the CONTRACTOR.

ARTICLE 17 - REMEDIES

This Contract shall be governed by the laws of the State of Florida. Any and all legal action necessary to enforce the Contract will be held in a court of competent jurisdiction located in Palm Beach County, Florida. No remedy herein conferred upon any party is intended to be exclusive of any other remedy, and each and every such remedy shall be cumulative and shall be in addition to every other remedy given hereunder now or hereafter existing at law, or in equity, by statute or otherwise. No single or partial exercise by any party of any right, power, or remedy hereunder shall preclude any other or further exercise thereof.

No provision of this Contract is intended to, or shall be construed to, create any third party beneficiary or to provide any rights to any person or entity not a party to this Contract, including but not limited to any citizen or employees of the COUNTY and/or CONTRACTOR.
ARTICLE 18 - CONFLICT OF INTEREST

The CONTRACTOR represents that it presently has no interest and shall acquire no interest, either direct or indirect, which would conflict in any manner with the performance or services required hereunder, as provided for in Chapter 112, Part III, F.S. and the Palm Beach County Code of Ethics. The CONTRACTOR further represents that no person having any conflict of interest shall be employed for said performance or services.

The CONTRACTOR shall promptly notify the COUNTY's representative, in writing, by certified mail, of all potential conflicts of interest for any prospective business association, interest or other circumstance which may influence, or appear to influence, the CONTRACTOR's judgment or quality of services being provided hereunder. Such written notification shall identify the prospective business association, interest or circumstance, the nature of work that the CONTRACTOR may undertake and request an opinion of the COUNTY as to whether the association, interest or circumstance would, in the opinion of the COUNTY, constitute a conflict of interest if entered into by the CONTRACTOR. The COUNTY agrees to notify the CONTRACTOR of its opinion by certified mail within thirty (30) days of receipt of notification by the CONTRACTOR. If, in the opinion of the COUNTY, the prospective business association, interest or circumstance would not constitute a conflict of interest by the CONTRACTOR, the COUNTY shall so state in the notification and the CONTRACTOR shall, at its option, enter into said association, interest or circumstance and it shall be deemed not in conflict of interest with respect to services provided to the COUNTY by the CONTRACTOR under the terms of this Contract.

ARTICLE 19 - PERFORMANCE DURING EMERGENCIES / EXCUSABLE DELAYS

The CONTRACTOR shall not be considered in default by reason of any failure in performance if such failure arises out of causes reasonably beyond the control of the CONTRACTOR, or its subcontractor(s), and without their fault or negligence. Such causes include, but are not limited to: acts of God; force majeure; natural or public health emergencies; labor disputes; freight embargoes; and abnormally severe and unusual weather conditions.

Upon the CONTRACTOR's request, the COUNTY shall consider the facts and extent of any failure to perform the work; and, if the CONTRACTOR's failure to perform was without it or its subcontractors' fault or negligence, the Contract Schedule and/or any other affected provision of this Contract shall be revised accordingly, subject to the COUNTY's rights to change, terminate, or stop any or all of the work at any time.

Notwithstanding anything in the foregoing to the contrary, the CONTRACTOR agrees and promises that, immediately preceding, during and after a public emergency, disaster, hurricane, flood, or act of God, the COUNTY shall be given "first priority" for all goods and services under this Contract. CONTRACTOR agrees to provide all goods and services to the COUNTY immediately preceding, during and after a public emergency, disaster, hurricane, flood, or act of God, at the terms, conditions, and prices as provided in this Contract on a "first priority" basis. CONTRACTOR shall furnish a 24-hour phone number...
to the COUNTY. Failure to provide the goods or services to the COUNTY on a first priority basis immediately preceding, during and after a public emergency, disaster, hurricane, flood, or act of God, shall constitute breach of Contract and subject the CONTRACTOR to sanctions from doing further business with the COUNTY.

ARTICLE 20 - ARREARS

The CONTRACTOR shall not pledge the COUNTY’s credit or make it a guarantor of payment or surety for any contract, debt, obligation, judgment, lien, or any form of indebtedness. The CONTRACTOR further warrants and represents that it has no obligation or indebtedness that would impair its ability to fulfill the terms of this Contract.

ARTICLE 21 - DISCLOSURE AND OWNERSHIP OF DOCUMENTS

The CONTRACTOR shall deliver to the COUNTY’s representative for approval and acceptance, and before being eligible for final payment of any amounts due, all documents and materials prepared by and for the COUNTY under this Contract.

The CONTRACTOR agrees that copies of any and all property, work product, documentation, reports, computer systems and software, schedules, graphs, outlines, books, manuals, logs, files, deliverables, photographs, videos, tape recordings or data relating to this Contract which have been created as a part of the CONTRACTOR’s services or authorized by the COUNTY as a reimbursable expense, whether generated directly by the CONTRACTOR or by or in conjunction or consultation with any other party whether or not a party to this Contract, whether or not in privity of contract with the COUNTY or CONTRACTOR, and wherever located shall be the property of the COUNTY.

To the extent allowed by Chapter 119, F.S., all written and oral information not in the public domain or not previously known, and all information and data obtained, developed, or supplied by the COUNTY, or at its expense, will be kept confidential by the CONTRACTOR and will not be disclosed to any other party, directly or indirectly, without the COUNTY’s prior written consent, unless required by a lawful court order. All drawings, maps, sketches, programs, data bases, reports and other data developed or purchased under this Contract for the COUNTY, or at the COUNTY’s expense, shall be and remain the COUNTY’s property and may be reproduced and reused at the discretion of the COUNTY.

All covenants, agreements, representations and warranties made herein, or otherwise made in writing by any party pursuant hereto, including but not limited to any representations made herein relating to disclosure or ownership of documents, shall survive the execution and delivery of this Contract and the consummation of the transactions contemplated hereby.

ARTICLE 22 - INDEPENDENT CONTRACTOR RELATIONSHIP

The CONTRACTOR is, and shall be, in the performance of all work, services, and activities under this Contract, an Independent Contractor and not an employee, agent, or
servant of the COUNTY. All persons engaged in any of the work or services performed pursuant to this Contract shall at all times, and in all places, be subject to the CONTRACTOR's sole direction, supervision, and control. The CONTRACTOR shall exercise control over the means and manner in which it and its employees perform the work, and in all respects the CONTRACTOR's relationship, and the relationship of its employees, to the COUNTY shall be that of an Independent Contractor and not as employees or agents of the COUNTY.

The CONTRACTOR does not have the power or authority to bind the COUNTY in any promise, agreement, or representation other than specifically provided for in this Contract.

ARTICLE 23 - CONTINGENT FEE

The CONTRACTOR warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for the CONTRACTOR, to solicit or secure this Contract and that it has not paid or agreed to pay any person, company, corporation, individual, or firm, other than a bona fide employee working solely for the CONTRACTOR, any fee, commission, percentage, gift, or any other consideration contingent upon or resulting from the award or making of this Contract.

ARTICLE 24 - PUBLIC RECORDS, ACCESS AND AUDITS

The COUNTY shall have the right to request and review CONTRACTOR's books and records to verify CONTRACTOR's compliance with this Contract, adherence to the EBO Program and its proposal. The COUNTY shall have the right to interview subcontractors and workers at the work site to determine Contract compliance. The CONTRACTOR shall maintain records related to all charges, expenses, and costs incurred in estimating and performing the work for at least five (5) years after completion or termination of the Contract. CONTRACTOR shall retain all books and records pertaining to this Contract, including, but not limited to, subcontractor payment records, for five (5) years after project completion date. The COUNTY and the Palm Beach County Inspector General shall have access to such records as required in this Article for the purpose of inspection or audit during normal business hours, in Palm Beach County at any reasonable time during the five (5) years.

Notwithstanding anything contained herein, as provided under Section 119.0701, F.S., if the CONTRACTOR: (i) provides a service; and (ii) acts on behalf of the COUNTY as provided under Section 119.011(2), F.S., the CONTRACTOR shall comply with the requirements of Section 119.0701, F.S., as it may be amended from time to time. The CONTRACTOR is specifically required to:

A. Keep and maintain public records required by the COUNTY to perform services as provided under this Contract.

B. Upon request from the COUNTY's Custodian of Public Records (COUNTY's Custodian) or COUNTY's representative/liaison, on behalf of the COUNTY's
Custodian, provide the COUNTY with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119 or as otherwise provided by law. The CONTRACTOR further agrees that all fees, charges and expenses shall be determined in accordance with Palm Beach County PPM CW-F-002, Fees Associated with Public Records Requests, as it may be amended or replaced from time to time.

C. Ensure that public records that are exempt, or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the Contract, if the CONTRACTOR does not transfer the records to the public agency. Nothing contained herein shall prevent the disclosure of or the provision of records to the COUNTY.

D. Upon completion of the Contract, the CONTRACTOR shall transfer, at no cost to the COUNTY, all public records in possession of the CONTRACTOR unless notified by COUNTY's representative/liaison, on behalf of the COUNTY's Custodian, to keep and maintain public records required by the COUNTY to perform the service. If the CONTRACTOR transfers all public records to the COUNTY upon completion of the Contract, the CONTRACTOR shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the CONTRACTOR keeps and maintains public records upon completion of the Contract, the CONTRACTOR shall meet all applicable requirements for retaining public records. All records stored electronically by the CONTRACTOR must be provided to COUNTY, upon request of the COUNTY's Custodian or the COUNTY's representative/liaison, on behalf of the COUNTY's Custodian, in a format that is compatible with the information technology systems of COUNTY, at no cost to COUNTY.

CONTRACTOR acknowledges that it has familiarized itself with the requirements of Chapter 119, F. S., and other requirements of state law applicable to public records not specifically set forth herein. Failure of the CONTRACTOR to comply with the requirements of this Article, Chapter 119, F.S. and other applicable requirements of state law, shall be a material breach of this Contract. COUNTY shall have the right to exercise any and all remedies available to it for breach of contract, including but not limited to, the right to terminate for cause.

IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, PLEASE CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT RECORDS REQUEST, PALM BEACH COUNTY PUBLIC AFFAIRS DEPARTMENT, 301 N. OLIVE AVENUE, WEST PALM BEACH,
ARTICLE 25 - NON-DISCRIMINATION

A. Employer Non-Discrimination
The COUNTY is committed to assuring equal opportunity in the award of contracts and complies with all laws prohibiting discrimination. Pursuant to Palm Beach County Resolution R-2017-1770, as may be amended, the CONTRACTOR warrants and represents that throughout the term of the Contract, including any renewals thereof, all of its employees are treated equally during employment without regard to race, color, religion, disability, sex, age, national origin, ancestry, marital status, familial status, sexual orientation, gender identity or expression, or genetic information. Failure to meet this requirement shall be considered default of the Contract.

B. Commercial Non-Discrimination
As a condition of entering into this Contract, the CONTRACTOR represents and warrants that it will comply with the COUNTY'S Commercial Nondiscrimination Policy as described in Resolution 2017-1770, as amended. As part of such compliance, the CONTRACTOR shall not discriminate on the basis of race, color, national origin, religion, ancestry, sex, age, marital status, familial status, sexual orientation, gender identity or expression, disability, or genetic information in the solicitation, selection, hiring or commercial treatment of subcontractors, vendors, suppliers, or commercial customers, nor shall the CONTRACTOR retaliate against any person for reporting instances of such discrimination. The CONTRACTOR shall provide equal opportunity for subcontractors, vendors and suppliers to participate in all of its public sector and private sector subcontracting and supply opportunities, provided that nothing contained in this clause shall prohibit or limit otherwise lawful efforts to remedy the effects of marketplace discrimination that have occurred or are occurring in the COUNTY's relevant marketplace in Palm Beach County. The CONTRACTOR understands and agrees that a material violation of this clause shall be considered a material breach of this Contract and may result in termination of this Contract, disqualification or debarment of the company from participating in COUNTY contracts, or other sanctions. This clause is not enforceable by or for the benefit of, and creates no obligation to, any third party. CONTRACTOR shall include this language in its subcontracts.

ARTICLE 26 - AUTHORITY TO PRACTICE

The CONTRACTOR hereby represents and warrants that it has, and will continue to maintain, all licenses and approvals required to conduct its business; and, that it will, at all times, conduct its business activities in a reputable manner. Proof of such licenses and approvals shall be submitted to the COUNTY's representative upon request.
ARTICLE 27 - SEVERABILITY

If any term or provision of this Contract or the application thereof to any person or circumstances shall, to any extent, be held invalid or unenforceable, the remainder of this Contract, or the application of such terms or provision to persons or circumstances other than those as to which it is held invalid or unenforceable, shall not be affected, and every other term and provision of this Contract shall be deemed valid and enforceable to the extent permitted by law.

ARTICLE 28 - PUBLIC ENTITY CRIMES

As provided in F.S. 287.132-133, by entering into this Contract or performing any work in furtherance hereof, the CONTRACTOR certifies that it, its affiliates, suppliers, subcontractors and consultants who will perform hereunder, have not been placed on the convicted vendor list maintained by the State of Florida Department of Management Services within the thirty-six (36) months immediately preceding the date hereof. This notice is required by F.S. 287.133(3)(a).

ARTICLE 29 - SCRUTINIZED COMPANIES

A. As provided in F.S. 287.135, by entering into this Contract or performing any work in furtherance hereof, the CONTRACTOR certifies that it, its affiliates, suppliers, subcontractors and consultants who will perform hereunder, have not been placed on the Scrutinized Companies that Boycott Israel List or is engaged in a boycott of Israel, pursuant to F.S. 215.4725. Pursuant to F.S. 287.135(3)(b), if CONTRACTOR is found to have been placed on the Scrutinized Companies that Boycott Israel List or is engaged in a boycott of Israel, this Contract may be terminated at the option of the COUNTY.

B. When contract value is greater than $1 million: As provided in F.S. 287.135, by entering into this Contract or performing any work in furtherance hereof, the CONTRACTOR certifies that it, its affiliates, suppliers, subcontractors and consultants who will perform hereunder, have not been placed on the Scrutinized Companies With Activities in Sudan List or Scrutinized Companies With Activities in The Iran Petroleum Energy Sector List created pursuant to F.S. 215.473 or is engaged in business operations in Cuba or Syria. If the COUNTY determines, using credible information available to the public, that a false certification has been submitted by CONTRACTOR, this Contract may be terminated and a civil penalty equal to the greater of $2 million or twice the amount of this Contract shall be imposed, pursuant to F.S. 287.135. Said certification must also be submitted at the time of Contract renewal.

ARTICLE 30 - MODIFICATIONS OF WORK

The COUNTY reserves the right to make changes in Scope of Work, including alterations, reductions therein, or additions thereto. Upon receipt by the CONTRACTOR of the
COUNTY's notification of a contemplated change, the CONTRACTOR shall, in writing: (1) provide a detailed estimate for the increase or decrease in cost due to the contemplated change; (2) notify the COUNTY of any estimated change in the completion date; and (3) advise the COUNTY if the contemplated change shall affect the CONTRACTOR's ability to meet the completion dates or schedules of this Contract.

If the COUNTY so instructs, in writing, the CONTRACTOR shall suspend work on that portion of the Scope of Work affected by a contemplated change, pending the COUNTY's decision to proceed with the change.

If the COUNTY elects to make the change, the COUNTY shall initiate a Contract Amendment, and the CONTRACTOR shall not commence work on any such change until such written amendment is signed by the CONTRACTOR and approved and executed on behalf of Palm Beach County.

ARTICLE 31 - NOTICE

All notices required in this Contract shall be sent by certified mail (return receipt requested), hand delivered, or sent by other delivery service requiring signed acceptance. If sent to the COUNTY, notices shall be addressed to:

Melody Thelwell, Director
Purchasing, Palm Beach County
50 South Military Trail, Suite 110
West Palm Beach, FL 33415

With a copy to:

Emanuel Perry, Director
Tourism Development Council
Palm Beach County
2195 Southern Blvd
West Palm Beach, FL 33406

If sent to the CONTRACTOR, notices shall be addressed to:

Richard Cutting-Miller, Vice President, Tourism Strategy
Conventions, Sports, Leisure International LLC
61 Broadway, Suite 2400
New York, N.Y. 10006

ARTICLE 32 - ENTIRETY OF CONTRACTUAL AGREEMENT

The COUNTY and the CONTRACTOR agree that this Contract sets forth the entire agreement between the parties, and that there are no promises or understandings other than those stated herein. None of the provisions, terms, and conditions contained in the
Contract may be added to, modified, superseded, or otherwise altered, except by written instrument executed by the parties hereto in accordance with Article 30 - Modifications of Work.

ARTICLE 33 - REGULATIONS; LICENSING REQUIREMENTS

The CONTRACTOR shall comply with all laws, ordinances and regulations applicable to the services contemplated herein, to include those applicable to conflict of interest and collusion. CONTRACTOR is presumed to be familiar with all federal, state and local laws, ordinances, codes and regulations that may in any way affect the services offered.

ARTICLE 34 - COUNTERPARTS

This Contract, including the exhibits referenced herein, may be executed in one or more counterparts, all of which shall constitute collectively but one and the same Contract. The COUNTY may execute the Contract through electronic or manual means. CONTRACTOR shall execute by manual means only, unless the COUNTY provides otherwise.

ARTICLE 35 - E-VERIFY - EMPLOYMENT ELIGIBILITY

CONTRACTOR warrants and represents that it is in compliance with section 448.095, Florida Statutes, as may be amended, and that it: (1) is registered with the E-Verify System (E-Verify.gov) and uses the E-Verify System to electronically verify the employment eligibility of all newly hired workers; and (2) has verified that all of CONTRACTOR’s subconsultants performing the duties and obligations of this Contract are registered with the E-Verify System and use the E-Verify System to electronically verify the employment eligibility of all newly hired workers.

CONTRACTOR shall obtain from each of its subconsultants an affidavit stating that the subconsultant does not employ, contract with, or subcontract with an Unauthorized Alien, as that term is defined in section 448.095(1)(k), Florida Statutes, as may be amended. CONTRACTOR shall maintain a copy of any such affidavit from a subconsultant for, at a minimum, the duration of the subcontract and any extension thereof. This provision shall not supersede any provision of this Contract which requires a longer retention period.

COUNTY shall terminate this Contract if it has a good faith belief that CONTRACTOR has knowingly violated Section 448.09(1), Florida Statutes, as may be amended. If COUNTY has a good faith belief that CONTRACTOR’s subconsultant has knowingly violated section 448.09(1), Florida Statutes, as may be amended, COUNTY shall notify CONTRACTOR to terminate its contract with the subconsultant and CONTRACTOR shall immediately terminate its contract with the subconsultant. If COUNTY terminates this Contract pursuant to the above, CONTRACTOR shall be barred from being awarded a future contract by COUNTY for a period of one (1) year from the date on which this Contract was terminated. In the event of such contract termination, CONTRACTOR shall also be liable for any additional costs incurred by COUNTY as a result of the termination.
WHEREOF, the Board of County Commissioners of Palm Beach County, Florida has made and executed this AGREEMENT on behalf of the COUNTY and CONTRACTOR has hereunto set its hand the day and year above written.

ATTEST:
JOSEPH ABRUZZO
CLERK AND COMPTROLLER

By: __________________________________________
   Deputy Clerk

Palm Beach County
Board of County Commissioners:

By: __________________________________________
   Maria Sachs, Mayor

CONVENTIONS, SPORTS, LEISURE
INTERNATIONAL, LLC

By: __________________________________________
   Richard Cutting-Miller
   Richard Cutting-Miller, Vice President
   Tourism Strategy

APPROVED AS TO TERMS AND CONDITIONS

By: __________________________________________
   Emanuel Perry
   Emanuel Perry, Director
   Tourist Development Council

APPROVED AS TO FORM
AND LEGAL SUFFICIENCY

By: __________________________________________
   Anne Helfant
   Anne Helfant
   Assistant County Attorney
EXHIBIT A
SCOPE OF WORK/SERVICES
Contract No. 23-104/LAC

1. BACKGROUND AND GOALS

A Tourism Master Plan (TMP) should provide a long-term visionary roadmap to maintain and enhance Palm Beach County’s (COUNTY) position relative to other competitive tourism destinations. A TMP also serves a range of purposes: it creates a consensus between the stakeholders who participate in decision making on tourism related development for the region; it helps investors and businesses understand where they could be putting their energies as the vision for tourism is realized; and it helps all audiences understand and close the gap between what visitors and residents wish to experience (the "demand side" of the equation) and stakeholders who create and offer them activities and experiences (the "supply side"). A TMP should anticipate future development needs and opportunity markets to position Palm Beach County as one of the top destinations in the State of Florida, nationally and internationally.

Ultimately, a TMP should support the collective aspirations of Tourist Development Council (TDC) Agencies, COUNTY and community leadership to:

- Improve the lives of residents by providing economic opportunities;
- Spearhead destination enhancing infrastructure;
- Promote cultural and sports activities;
- Attract/create transformational events, and;
- Champion Diversity, Equity, and Inclusion (DEI) and sustainable tourism practices as the guiding pillars for future tourism marketing, sales and product development.

The CONTRACTOR shall produce a consensus based 20-year TMP for Palm Beach County, FL. The main purpose of this project is to build a comprehensive guide that assesses and builds upon current capacity and strategic plans across industry partners and 12 regions within The Palm Beaches.

The ideal consulting firm will have expertise in destination planning with a successful track record with balancing the complexities and building consensus with multiple public and private stakeholders.

The core issues the Tourism Master Plan must address:

1.1. Recommendations on policies and programs that enhance current marketing, branding and sales strategies to effectively integrate with The Tourist Development Council and it’s agencies to ensure competitiveness and a leading position in tourism performance.
1.2. Recommendations for roles that county economic development and planning agencies, and each regional municipality can integrate to further elevate Palm Beach County into a world class iconic destination brand in the minds of leisure travelers, meeting planners, cultural audiences, sports events rights holders and film producers.

1.3. Recommendations on key developments that Palm Beach County and each region should focus on to ensure The Palm Beaches is the premier destination in Florida - including but not limited to iconic landmarks, attractions, cultural institutions, sports facilities, events, festivals, nature-based recreation, urban renewal and critical infrastructure. Recommendations should include ideas and mechanisms for funding sources to accomplish goals.

2. **KEY PROJECT ELEMENTS**

2.1. **Situational analysis** which may include reviewing:
- Historic tourism performance
- Performance of the destination’s competitive set promotional activities and destination assets
- Asset maps of hotels, attraction, cultural institutions, and sports facilities
- Strategic plans, brand positioning of Tourist Development Council, its agencies and regions
- SWOT and/or GAP analysis
- Impact studies on culture, sports, film/TV, convention and conference districts, business and leisure events
- DestinationNEXT, OrganizationNext and other future facing studies relative to tourism components, trends and issues
- Review current consumer research and determine additional needs

2.2. **Stakeholder consultations and workshops** with key county and city officials, industry stakeholders and community leaders to assess current plans and future needs

2.3. **Recommendations** regarding key issues including:
- **Quality of the visitor experience** such as transportation, wayfinding, technology
- **Resident quality of life** such as public spaces and entertainment districts
- **Community building** such as workforce development, stakeholder engagement, ensuring a representation from diversity of regions/experiences
- **Destination development** such as landmarks/icons, attractions, cultural institutions, sports facilities, outdoor recreation, business and leisure events
- **Sustainability** such as high/low demand periods and regions, environmental impacts, accessibility, funding models, crisis management
- **Other issues** identified in situational analysis and stakeholder consultations
2.4. An implementation plan including suggested timelines, key metrics to track progress and ways/resources required to facilitate development of key identified projects, initiatives and strategies for the Tourist Development Council and its agencies as well as county, municipal and other community leadership.

3 EXPECTED DELIVERABLES

3.1. Full report delineating all key elements that address the core issues

3.2. Presentation to the TDC Board, TDC Agency boards, Board of County Commissioners, and other key audiences

3.3. Initial guidance on plan implementation with option to retain for further implementation phases
EXHIBIT B
CONTRACTOR'S PROPOSAL
Dated September 5, 2023
Contract No. 23-104/LAC
(consisting of 100 pages)
PROPOSAL TO CONDUCT A
TOURISM MASTER PLAN
FOR PALM BEACH COUNTY
FOR THE BENEFIT OF THE TOURIST DEVELOPMENT COUNCIL
SEPTEMBER 5, 2023
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Dear Ms. Clavette:

CSL International (CSL) is pleased to submit this proposal to Palm Beach County (PBC), which seeks the services of a professional consulting firm to "provide a foundation to articulate a clear vision for the future by creating a market-leading 20-year master plan for tourism development. The Plan will be used to guide, identify, innovate, create, and communicate unique products, programming, and experiences along with long-term planning for Palm Beach County that balances the destination's economic vision, tourism assets, stakeholder interests, and visitor demand."

The Tourism Master Plan for Palm Beach County will consist of:

- A Plan that recognizes the significant potential of the destination to broaden visitor attraction into new markets, create and deliver sustainable and inclusive products and experiences for visitors and residents alike.
- A Plan that understands the critical importance of the Palm Beach County visitor and beyond in terms of visitation, employment, and economic growth.
- A Plan that clearly identifies capital and infrastructure improvements needed to sustainably grow the visitor sector.
- A Plan that has measurable goals and key performance indicators.
- A Plan that carefully considers emerging visitor segments, their expectations, their aspirations, and their motivations to travel.
- A Plan that identifies new and more diverse target markets for the tourism sector, while enhancing capture in existing segments.
- A Plan that focuses attention on quality-of-life enhancements and encourages residents to engage in their destination deeply and broadly.
- A Plan that is fully linked to broader economic development, sustainability, and diversity / equity / inclusion goals, recognizing that business and workforce attraction depends in part on a well-conceived portfolio of destination assets in the hospitality, event, and attraction sectors.

Ultimately, the Plan will serve as a collaborative, goals-oriented, and mission-focused roadmap for the County that is well communicated to officials, stakeholders, businesses, and residents.
OUR EXTENSIVE TOURISM AND DESTINATION PLANNING EXPERIENCE

CSL International was established in 1988 for the specific purpose of providing a source of focused research and visioning in the tourism, events and attraction industries, our team of 20 consultants collectively offer over 200 years of relevant consulting experience. With offices in New York City, Minneapolis, Chicago, and Frisco TX, CSL has conducted over 2,000 planning projects focused on the tourism assets, attractions, facilities, policies, resources, and products needed to attract visitors and events to important destinations and enhance quality of life for residents. CSL is a wholly owned subsidiary of Legends.

CSL and its management team has been responsible for the direction, management, and production of some of the most important Tourism Master Plans written in the past 10-years including the Tourism Master Plans for The City of Los Angeles, Tucson AZ, Portland OR, Vancouver BC, San Luis Obispo CA, and Palm Springs, CA. In Florida, our broader industry work has covered the state including: Pensacola, Destin, Tallahassee, Jacksonville, Clay County, Gainesville, Orlando, Kissimmee, Osceola County, Tampa, Sarasota, Sunrise, Ft. Lauderdale, Miami, and Miami Beach. In Palm Beach County our broader industry work has included: Palm Beach Convention Center, Hard Rock Stadium, and FAU Stadium.

OUR PHILOSOPHY AND GUIDING PRINCIPALS

Unique among economic development initiatives, investment in the tourism and hospitality industry can increase economic activity, support businesses within and beyond the visitor industry sector, create important employment opportunities, bolster local tax revenues thereby reducing the tax burden on residents, and improve quality of life. We also know that a "stand-still" approach never works - your competition, both regionally and nationally continue to invest in tourism generating assets, increasing the need for careful strategic planning. To provide for long term growth in an increasingly competitive segment of the economy, we believe that the importance of comprehensive long-term destination strategy planning is difficult to overstate.

Our extensive portfolio of tourism strategy and planning experience provides us with a very clear understanding of the outreach and research steps needed to prepare a credible, collaborative foundation for developing a Tourism Master Plan for the Palm Beach County tourism industry and residents. CSL’s tourism planning process will illustrate our key principles for these types of projects:

- RESPONSIVE to the needs of residents, visitors, and stakeholders
- TREND FORWARD creating a plan for the future, based on new opportunities, technologies, and conditions
- RESEARCH BASED, providing a significant foundation for strategies, recommendations, and actions
- COORDINATED, considering existing research, strategies and linking tourism to resident quality of life and economic growth
- CREATING GROWTH & DIVERSIFICATION in Palm Beach County tourism sector and broader economy
- ACTIONABLE & MEASURABLE based on rigorous research coupled with key performance metrics and benchmarks

Ultimately, the Plan will provide strategic direction as Palm Beach County embarks on efforts to address its core issues to:

- Enhance marketing and sales strategies
  - Integrate with Tourist Development Council and agencies
  - Secure competitive position in tourism
- Integrate the roles of economic development and planning agencies
  - Elevate Palm Beach County as iconic destination
  - Target leisure travelers, meeting planners, cultural audiences, etc.
- Ensure key developments for premier destination status
  - Focus on iconic landmarks, attractions, and cultural institutions
  - Develop sports facilities, events, festivals, and nature-based recreation
  - Urban renewal and critical infrastructure improvements
  - Recommend funding sources for achieving goals

For this project, we have assembled a team of four world class subject matter organizations and an important local expert (subcontractors to CSL) to complement the Tourism Master Planning experience of CSL. These include:

- Global Sustainable Tourism Council to address Destination Sustainability Issues
- Tourism Diversity Matters to address Diversity, Equity, Inclusion (DEI) and Workforce Issues
- S.A.Nelson & Associates, a certified S/M/WBE - to guide project team efforts in Palm Beach County

Our 11-stage one-year process will include significant stakeholder outreach and engagement throughout the County and all municipalities, detailed review of existing strategies / reports / plans, focused and insightful primary research, benchmarking against peer and aspirational destinations and forward-looking stakeholder visioning workshops. Year two and beyond of the project is dedicated to an optional, but critically important implementation phase, which will be determined, programmed, and set forth in consultation with Palm Beach County. All of this will be guided by world class experts in tourism master planning, tourism branding and marketing strategy, sustainability, and DEI. This extensive process will yield strategies for sustainably growing and diversifying tourism market capture, investing in tourism product development and creating unique experiences for visitors and residents, all under the guidance and watchful eye of CSL International project management experts.

We have included details of our project approach in this document plus workplan and project fee information. Also, included in this document is an overview of CSL International and our project partners, copies of our project team resumes / bios, summary of similar projects, and references which illustrate our capacity to do this type of work.

We commit that the highest level of industry expertise within CSL our partners will be dedicated to preparing the Tourism Master Plan for Palm Beach County, and sincerely appreciate the opportunity to submit this proposal for such an important and impactful study. Please do not hesitate to contact me as the primary contact for this project with any questions or comments at (646) 338-0300, or at RCuttingMiller@cslintl.com

Sincerely,

Richard Cutting-Miller
Vice President, Tourism Strategy
Conventions, Sports, Leisure International LLC
61 Broadway, Suite 2400
New York, NY. 10006
www.CSLIntl.com
DIVERSITY & INCLUSION AT LEGENDS

Legends is proud to celebrate diversity as part of our culture and DNA. Diversity is critical to the success of our business, it is a key driver of growth and innovation, and provides a distinct competitive advantage. Simply put, diversity is good for business and good for society overall. With this commitment and to help us reach our goals, we have developed our Diversity, Inclusion and Growth Platform. This platform is backed by a robust strategy and various programming that will focus on these core principles:

Legends' Diversity, Inclusion & Growth platform will focus on these core principles:

- Create a culture of authenticity, transparency and belonging.
- Establish strategies that enables Legends to recruit and hire diverse talent who embody our values and represent a variety of backgrounds, identities, experiences, and perspectives.
- Educate our team on the value and importance of diversity and inclusion, by fostering sensitivity and awareness around challenges including unconscious bias and gender/racial equity.
- Provide growth opportunities that empower our people to own and grow their careers, while fostering respect and collaboration across the organization, to deliver best-in-class results.
TECHNICAL PROPOSAL
3.1.1 STATEMENT OF EXPERIENCE, QUALIFICATIONS, AND BACKGROUND

CSL INTERNATIONAL - THE LEADING ADVISORY AND PLANNING FIRM SPECIALIZING IN PROVIDING CONSULTING SERVICES TO THE SPORTS, ENTERTAINMENT, CONVENTION & TOURISM INDUSTRIES

CSL was established in 1988 for the specific purpose of providing a source of focused strategic planning and extensive research for the tourism, attraction, convention, entertainment, and sports sectors. Members of our firm have been providing services to these specialized industries over the last 30 years and have been involved in over 2,000 engagements. We assist our clients from the earliest stages of project planning, ensuring that all decisions are informed ones. Our consultants provide in-depth information, creative solutions to underlying issues, a thorough analysis of financial implications, and various measurements of risk and return surrounding alternative courses of action. CSL has built its reputation on meeting client needs by delivering quality services that address what we know are key pillars for a successful and sustainable tourism planning process:

- Heavily research based, with a very significant foundation of local, in-person stakeholder outreach, extensive customer research specific to the Village and local area, and a focus on community that carefully considers the views of residents.

- Providing a strategic platform to help build actionable recommendations with adequate funding resources, realistic timelines, and a description of the public and private entities that are essential for implementation.

- Creating a measurable framework for determining the on-going success of each recommended initiative, including key performance metrics and return on investment measures.

With our extensive team of highly trained and experienced professionals and a 30-year history of successful projects, we provide highly valued strategic planning guidance to tourism organization clients throughout North America, Florida and Palm Beach County as well as owners and operators of major visitor generating assets domestically and internationally.
OUR WORK IN FLORIDA

CSL will leverage its familiarity of Palm Beach County and past tourism-focused research and analysis in the State of Florida.

Each of our recent engagements in Florida have focused on destinations and facility products that involved evaluating event demand, tourism strategy and marketing, and supporting tourism, hospitality, and attraction infrastructure. We expect this experience and expertise to give us a head start in producing the Tourism Master Plan for Palm Beach County.
OUR WORK IN TOURISM STRATEGY

CSL’s Tourism Strategy Practice, now led by Richard Cutting-Miller, has delivered a long list of tourism strategy projects, helping cities, counties and destinations agree a collective vision for their destinations that enhances the visitor experience and quality of life for residents. Please note, the following list includes projects delivered by CSL as well as projects delivered by Richard Cutting-Miller (previously head of Tourism Strategy for Resonance Consultancy).

- LOS ANGELES (CITY OF) - TOURISM MASTER PLAN
- PALM SPRINGS, CALIFORNIA - DESTINATION DEVELOPMENT PLAN
- SAN LUIS OBISPO COUNTY CA - DESTINATION MANAGEMENT STRATEGY
- SCOTTSDALE, ARIZONA - DOWNTOWN TOURISM FEASIBILITY STUDY
- TUCSON, ARIZONA - TOURISM MASTER PLAN
- PORTLAND, OREGON - TOURISM MASTER PLAN
- VANCOUVER, BRITISH COLUMBIA - TOURISM MASTER PLAN

While some of these projects took place before the COVID pandemic, others have been produced post-pandemic to address the specific recovery issues associated with restarting the tourism industry.

SUBCONTRACTORS

For this project, CSL International has engaged two subject matter experts to provide specific research, destination assessments and recommendations regarding Sustainability and DEI, and a third firm (Palm Beach County Certified S/M/WBE) to help guide project team efforts in Palm Beach County.
The Global Sustainable Tourism Council® (GSTC®) establishes and manages global standards for sustainable travel and tourism, known as the GSTC Criteria. There are two sets: Destination Criteria for public policymakers and destination managers, and Industry Criteria for hotels and tour operators. They are the result of a worldwide effort to develop a common language about sustainability in tourism. They are arranged in four pillars: (A) Sustainable management; (B) Socioeconomic impacts; (C) Cultural impacts; and (D) Environmental impacts. Since tourism destinations each have their own culture, environment, customs, and laws, the Criteria are designed to be adapted to local conditions and supplemented by additional criteria for the specific location and activity.

The GSTC Criteria form the foundation Accreditation for Certification Bodies that certify hotels/accommodations, tour operators/transport providers, and destinations as having sustainable policies and practices in place. GSTC does not directly certify any products or services; but provides an accreditation program through its partner ASI/Assurance Services International to accredit Certification Bodies.

The GSTC is an independent and neutral organization, legally registered in the USA as a 501(c)3 non-profit organization that represents a diverse and global membership, including national and provincial governments, leading travel companies, hotels, tour operators, NGO’s, individuals, and communities — all striving to achieve best practices in sustainable tourism. It is a virtual organization without a main office, with staff and volunteers working from all six populated continents. Financial support from donations, sponsorship, and membership fees allows us to provide services at low costs and to create, revise, and make available the GSTC Criteria. GSTC is an ISEAL Community Member.

For more information, please visit our website at www.gstcouncil.org
TOURISM DIVERSITY MATTERS

Tourism Diversity Matters (TDM), founded as the collaborative leader of Diversity, Equity, and Inclusion (DEI) initiatives and concepts that can address the blind spots of ethnic disparities and provide decision-makers in the tourism industry access, resources, and tactics to develop more effective Diversity & Inclusion strategies that will engage and retain a diverse workforce.

MISSION

To be a diversity resource that will educate, advocate, engage and empower the tourism and events industry, in collaboration and cooperation with all other industry initiatives.

VISION

To be an industry resource for diversity expertise in order to achieve inclusive excellence.

TDM's goal is to sustain and expand our platform by affiliating with fellow industry partners and notable research institutions, creating solutions that can be implemented, contributing to organizational success. In order to achieve that goal, our board is comprised of leaders from all facets of the greater industry- www.tourismdiversymatters.org/about/

THE FOUR PILLARS OF TOURISM DIVERSITY MATTERS

APPRENTICESHIP PROGRAM

The goal of the program is to expand the hospitality and tourism workforce by attracting underrepresented and ethnically diverse college graduates and students to career opportunities they may not have considered.

WORKFORCE DEVELOPMENT

Design and recommend hiring procedures, recruitment practices, and succession planning methods that will influence talent development.

DIVERSITY, EQUITY & INCLUSION

Our knowledge provides fundamental diversity, equity, and inclusion (DEI) training for tourism organizations and individuals who want to implement real workplace changes.

RESEARCH & DATA

TDM is dedicated to sharing groundbreaking research and thought-provoking insights on diversity, equity, and inclusion.

For more information, please visit our website at www.tourismdiversymatters.org
S.A. Nelson & Associates leverages our deep expertise in community outreach to develop and execute customized, strategic public involvement plans to fit the specific needs of every project and client we serve.

Our goal is to use community resources to affect real change. We assist you with our communities' biggest assets - "People". We fit in to help you stand out.

**DIFFERENTIATORS/VALUE PROPOSITION**

Our expertise with diverse markets allows our clients to stand out and reach target audiences including the important Hispanic, African American and Caribbean consumers with the right media and the right message.

We provide the total solution, a one stop-shop experience. We advise, direct, consult, plan, manage, organize, create and coordinate... We make it all happen, the way you want it to happen, efficiently and effectively.

**CORE COMPETENCIES:**

- Strategic Marketing Plan Development & Management
- Advertising
- Community Development Plans
- Diversity Marketing/Outreach
- Web Based Marketing
- Grassroots Marketing
- Marketing Communications & Public Relations
- Product Introduction, Publicity & Support
- Media Relations/Brand Identity
- Press Release Development & Distribution
- Crisis Management
- Social Media Marketing
- Conference/Trade Show Planning & Management
- Corporate Gala's/Receptions
- Groundbreaking Ceremonies
- Grand Openings
- Workshops & Seminars

**ACCOMPLISHMENTS AND RECOGNITION**

- South Florida Magazine Top 50 Business Leader
- Business Matchmaker Small Business Advocate of the Year
- South Florida Business Leader Women Extraordinaire

Welcome to S.A. Nelson & Associates, a dynamic marketing and public engagement firm with a strong presence in the State of Florida. With a visionary leadership under President and CEO Sophia Nelson, we have become a prominent force in the industry since our establishment in 2016. Our seasoned team of marketing specialists possesses comprehensive knowledge and skills to handle every aspect of public relations and public engagement.
OUR APPROACH:

At S.A. Nelson & Associates, we firmly believe in the transformative power of effective public relations and public engagement. Our partnership approach revolves around the following core principles:

1. **STAKEHOLDER ENGAGEMENT:** We excel in engaging stakeholders through strategic consultations, workshops, and dialogues. As Palm Beach County seeks proposals for a Tourism Master Plan, we understand the significance of involving key county and city officials, industry stakeholders, and community leaders. Our approach prioritizes inclusive engagement to gather insights and perspectives that shape the foundation of a successful plan.

2. **COMPREHENSIVE RESEARCH:** In developing a robust Tourism Master Plan, thorough research is essential. Our team is proficient in conducting in-depth market research, analyzing trends, and assessing current plans. We ensure that our strategies are grounded in data-driven insights to make informed decisions that drive meaningful results.

3. **INNOVATIVE TECHNIQUES:** Leveraging advanced techniques is fundamental to our approach. We integrate innovative methods for stakeholder engagement, data collection, and impact measurement. By incorporating cutting-edge tools, we ensure that our solutions are not only effective but also forward-thinking.

4. **END-TO-END SOLUTIONS:** From stakeholder engagement and research to negotiations, closing, and stewardship, we handle the entire process seamlessly. Our team’s expertise extends across every phase of the project, guaranteeing a holistic approach that delivers results with efficiency and precision.

5. **RELATIONSHIP BUILDING AND STEWARDSHIP:** At S.A. Nelson & Associates, we are committed to building lasting relationships. Our collaborative partnerships extend beyond project completion. We offer ongoing stewardship to maximize the impact of our initiatives and maintain a strong connection with our partners.

UNPARALLELED EXPERTISE:

With our depth of knowledge and experience in public engagement, marketing, and strategic planning, we are uniquely positioned to drive your initiatives to new heights. The complex task of developing a Tourism Master Plan for Palm Beach County requires a partner who can navigate the intricacies with finesse and expertise.

S.A.Nelson is a certified S/M/WBE in Palm Beach County.

For more information, please visit our website at [https://sanelson.co](https://sanelson.co)
3.1.2 REFERENCES

Following are three Tourism Master Plan project references completed by tourism strategy teams led by Richard Cutting-Miller, Vice President, Tourism Strategy for CSL International. These clients and the projects completed for them are directly applicable to the Tourism Master Plan for the Palm Beach County and each former client has given their expressed permission to be contacted regarding this proposal. Please note the contract amounts are not publicly disclosed, so amounts are approximate.

**DOANE LIU**
Executive Director
City of Los Angeles Department of Convention and Tourism Development
Los Angeles, California
P: 213.765.1151
doane.liu@lacity.org

**CITY OF LOS ANGELES TOURISM MASTER PLAN**
Contract Amount: Approx. $500,000
Dates of Service: 2019-2020
Scope of Work: See Case Study #1
Full-Time Staff: 3-4

**JEFF MILLER**
President & CEO
Travel Portland
Portland, Oregon
P: 503.275.9797

**PORTLAND (OR) TOURISM MASTER PLAN**
Contract Amount: Approx. $250,000
Dates of Service: 2018-2019
Scope of Work: See Case Study #2
Full-Time Staff: 3-4

**BRENT DERAAD**
President & CEO
Visit Arlington
(Previously President & CEO, Visit Tucson)
P: (800) 433-5374
brent@arlington.org

**TUCSON (AZ) TOURISM MASTER PLAN**
Contract Amount: Approx. $250,000
Dates of Service: 2017-2018
Scope of Work: See Case Study #3
Full-Time Staff: 3-4
In the fall of 2018, the City of Los Angeles Department of Convention and Tourism Development (CTD) embarked on the development of a Tourism Master Plan to identify priorities that would enable the City to close the gaps and inefficiencies in its current and past approach towards tourism and advise on investments and changes that could address such challenges.

CTD Recognized several current and upcoming challenges for visitors on a regional and citywide basis, and asked that the Tourism Master Plan consider, among other things:

- A path for the sustainable growth of tourism in the City, including environmental sustainability, impacts on existing resources and infrastructure, and mitigating or preventing negative implications for local stakeholders or the quality of life of residents.
- Hotel growth within the City, including hotels within walking distance of the Los Angeles Convention Center.
- Matters related to short-term rentals, ride sharing and the legalization of marijuana for recreational use.
- Steps to be taken proactively to improve visitors' experience in relation to the homelessness issue, while being sensitive to the crisis at hand.
- Application of new technology and innovation, including market interruption and impacts, use of new analytics and application of new avenues of communication.
- The competitiveness of LA's approach to major sports and entertainment events.
- The treatment and improvement of large-scale, logistically complex events spanning multiple venues across the City to compete for major opportunities and navigate the negotiation/contracting process.
- How to attract and/or retain high-profile events bringing national and international acclaim to the City.
- Walkability in Downtown Los Angeles versus citywide infrastructure transportation challenges.
- General challenges that exist within certain Council Districts and the potential solutions the City could implement to initiate improvements.
CTD also asked that the Tourism Master Plan include a focus on visitor transportation in the City of Los Angeles and take into consideration City of Los Angeles Mayor Eric Garcetti’s Twenty-Eight by '28 initiative.

DEPARTMENT OF CONVENTION AND TOURISM DEVELOPMENT

Finally, CTD asked that the Tourism Master Plan consider the organization itself, including its organizational structure, current workload, operating budget, mission, and scope of work. The Plan was envisioned to provide recommendations on how CTD could expand its scope of work and existing role to provide the organizational and budgetary tools necessary for implementing the Tourism Master Plan and provide recommendations on how CTD could collaborate with other agencies and stakeholders. Regarding the organization’s focus on strategic planning, CTD anticipated that the Tourism Master Plan will serve as a guide on this matter.

The tourism strategy team’s approach to the creation of the Los Angeles Tourism Master Plan was designed to help officials, industry stakeholders and residents articulate and share a clear vision for the future—because when people share a vision of the future, it gives them shared belief, shared purpose, and shared passion.

The approach sought to define the destination as more than the sum of its parts. While the Tourism Master Plan addresses critical hardware—such as transportation or the Los Angeles Convention Center—that is required to achieve the City of Los Angeles' goals, it also addresses the software of relationships and programming required to foster the quality of life, culture, and experiences necessary to create a unique and compelling sense of place.

PHASE 1

SIX PIECES OF RESEARCH

Experience has taught us that successful destination management planning requires the participation and alignment of not only industry stakeholders but visitors and the local community as well. As such, the process was designed to consult, engage, and collaborate with tourism industry stakeholders, visitors, and the community. It is for this reason that the first stage of the Tourism Master Plan for the City of Los Angeles focused on six research activities. These six pieces of research, which were reviewed and critiqued by a Project Steering Committee of City and community leaders and industry stakeholders, have led to important insights that were considered in developing a future vision for Los Angeles as a destination and the resulting Tourism Master Plan.

1. TREND ANALYSIS
2. STAKEHOLDER ENGAGEMENT
3. VISITOR RESEARCH
4. COMMUNITY RESEARCH
5. COMPETITIVE ANALYSIS
6. HOSPITALITY ANALYSIS
1. TREND ANALYSIS

With the tourism economy evolving rapidly, major long-term trends such as increased competition, evolving demand, labor shortages and crumbling infrastructure present both new opportunities and challenges for destinations. As such, the tourism strategy team identified, presented, and discussed several key tourism trends associated with visitor activities, experiences, markets, destinations, and tourism organizations that needed to be considered in developing the Los Angeles Tourism Master Plan.

2. STAKEHOLDER ENGAGEMENT

The second piece of research included a listing of Strengths, Weakness, Opportunities and Threats (SWOT) identified in the Stakeholder Engagement conversations conducted in Los Angeles by the tourism strategy team Consultancy during February 2019. Approximately 125 stakeholders participated in 55 sessions. The primary purpose of these discussions was to identify participant opinions, aspirations, and ideas for the future of the City of Los Angeles as a destination, while also building an informal group of “champions” for the project who will be critical to endorsing and implementing the Tourism Master Plan upon completion.

3. VISITOR RESEARCH

The objective of the Tourism Master Plan Visitor Survey was to better understand who the current Los Angeles visitors are, how they compare to US travelers in general and what types of travelers might be attracted to the destination in the future. In consultation with the City of Los Angeles Department of Convention and Tourism Development staff, the tourism strategy team developed an online survey to identify and gauge previous visitors’ travel habits, preferences, and perceptions of Los Angeles.

The survey was distributed in English, Spanish and Chinese and extensively promoted by Los Angeles Tourism & Convention Board (LATCB) via email and social media platforms. A special secondary effort was undertaken by the tourism strategy team to reach Chinese-speaking visitors to assess their experiences.

The survey questions were designed to:

- Assess the demographic and psychographic characteristics of previous visitors to Los Angeles.
- Conduct a segmentation analysis of respondents to better understand Los Angeles visitors and how they differ from US travelers in general.
- Identify the motivating factors that drove previous visitors to select Los Angeles as their destination of choice.
- Assess the quality of and satisfaction with current services, accommodations, and amenities throughout Los Angeles.

Assess previous visitor perceptions of Los Angeles both before and after their visit. More than 1,500 previous visitors to Los Angeles participated in the survey.
4. COMMUNITY RESEARCH

The organizations and agencies responsible for tourism marketing and management in destinations around the world are undergoing profound change. These organizations and agencies are increasingly becoming responsible for activities beyond attracting greater numbers of visitors. Today’s tourism leaders need to be thoughtful about how the quality of life for residents can be balanced with the quality of the visitor experience; about the kinds of visitors who would most appreciate the destination’s character, its people, and its offerings; and how communities can responsibly grow a tourism industry for the benefit of all.

The fourth piece of research was conducted to identify and define general attitudes towards living in the City of Los Angeles and tourism’s impact on resident quality of life.

- What do residents think of the City of Los Angeles as a place to live?
- What are the most important attributes to resident quality of life?
- How do residents view the tourism industry and its impact on the community?

The answers to these questions helped to address key issues with respect to livability, culture, economy, and sense of place. In total, 909 residents of the City of Los Angeles participated in the community survey.

5. COMPETITIVE ANALYSIS

The fifth piece of research analyzed peer review channels from increasingly influential websites such as TripAdvisor and Yelp to identify how many quality experiences cities offer from one product and experience category to the next, as rated by locals and visitors themselves.

This research, which examined the quality of destinations from the visitors’ point of view to measure supply-side performance from one destination to the next, is a valuable tool to better understand the competitive advantages—and weaknesses—of the destination.

6. HOSPITALITY ANALYSIS

Last, HVS Convention, Sports & Entertainment Facilities Consulting (HVS) conducted an analysis of the impact of the Los Angeles Convention Center (LACC) on tourism to Los Angeles. This research included:

- A detailed analysis of lodging trends in Downtown Los Angeles and West LA, including projections of supply and demand.
- A comparison of five lodging submarkets throughout Los Angeles.
- A comparative analysis of the LACC to eight in-state convention centers and 16 national competitors based on function space and destination amenities.
- An analysis of LACC lost-business reports, which indicate the impact of expansion and increased hotel supply on LACC demand.
- An analysis of the net impacts historic LACC operations have had on the local lodging market through a “difference of means” test.
- An analysis of home sharing in nine submarkets across Los Angeles, including the substitutability of short-term rentals for hotel rooms.
Upon completion of Phase 1, which focused on the current state of tourism in Los Angeles, the project team turned its attention to the future; culminating in the Tourism Master Plan and its associated recommendations. As in the first phase, this section of work began with qualitative research, Visioning Sessions, which then guided the formation of the draft, and ultimately final, recommendations that are articulated in the Tourism Master Plan.

VISIONING WORKSHOPS

The results and information from these six research activities were presented and discussed in four visioning workshops to more than 75 stakeholders from a broad range of Los Angeles-based industry, government and community organizations, offices, agencies, and companies. The participants then engaged in a series of roundtable exercises designed to identify, develop, and articulate recommendations for the City of Los Angeles to address the various issues, opportunities and challenges that are facing LA travel and tourism. The exercises specifically focused on recommendations associated with destination development, destination programming and destination management, as well as overtourism.

DRAFT RECOMMENDATIONS

The results of the four workshops were then compiled into a Draft Recommendations Report, which was presented to the Project Steering Committee for consideration, feedback, and comment. The Los Angeles Tourism Master Plan Recommendations, Roles and Responsibilities are the result of this effort.

The Tourism Master Plan for Los Angeles sets forth a set of recommendations, roles and responsibilities that covers the major categories of destination management, from Visitor Mobility and Accommodations to Destination Stewardship and Management, that will allow the City to take the foundational steps to shape this new effort. To realize the vision for the City of Los Angeles and the Greater Los Angeles metro area, the Tourism Master Plan recommendations were organized into seven strategic areas of focus.

THE SEVEN STRATEGIC AREAS OF FOCUS

1. DESTINATION STEWARDSHIP
2. DESTINATION DEVELOPMENT
3. DESTINATION PROGRAMMING
4. VISITOR ACCOMMODATIONS
5. VISITOR MOBILITY
6. VISITOR INFORMATION & COMMUNICATIONS
7. DESTINATION MANAGEMENT

The Music Center's Walt Disney Concert Hall
The Tourism Master Plan sets forth a discussion of priorities for implementation to help the City of Los Angeles pick the "low-hanging fruit" and organize the necessary resources for some of the more complex, long-term, and resource-intensive recommendations. The document also presents Financial Considerations for the Recommendations to help put the budget and funding requirements into perspective and how they might relate to future revenue sources.

The following is an outline of the Tourism Master Plan recommendations. Further details can be found in the complete report available here.

1. DESTINATION STEWARDSHIP
   1.1 Create and Implement a Sustainable Tourism Program for Los Angeles

2. DESTINATION DEVELOPMENT
   2.1 Support the Expansion of the Los Angeles Convention Center
   2.2 Support a New Hollywood Visitor Center and Scenic Aerial Tramway or Gondola to the Hollywood Sign
   2.3 Support the Hollywood Walk of Fame Master Plan
   2.4 Increase Neighborhood Tourism Development

3. DESTINATION PROGRAMMING
   3.1 Develop and Position Los Angeles as a Leading Destination for Sports Tourism
   3.2 Develop and Position Los Angeles as a Leading Center for Creative Tourism
   3.3 Develop and Position Los Angeles as a Leading Culinary Destination
   3.4 Develop and Manage a Citywide Festival and Events Strategy
   3.5 Celebrate and Promote LA's Rich Cultural Diversity

4. VISITOR ACCOMMODATIONS
   4.1 Increase Short-Term Rental Collaboration
   4.2 Identify and Advocate for New Hotel Development Opportunities
   4.3 Monitor and Improve Visitor Satisfaction with Current Hotel Accommodations

5. VISITOR MOBILITY
   5.1 Reduce Usage of Cars by Visitors to the City
   5.2 Support the Redevelopment of Los Angeles International Airport

6. VISITOR INFORMATION & COMMUNICATIONS
   6.1 Research and Monitor Visitor Behavior
   6.2 Communicate and Inform Visitors
   6.3 Modernize and Improve Wayfinding

7. DESTINATION MANAGEMENT
   7.1 Establish Los Angeles Tourism Cabinet and Chief Tourism Officer
   7.2 Improve Regional Cooperation
Leading up to 2018, TravelPortland recognized that the role of destination marketers was undergoing profound changes, and that the organization was then responsible for much more than simply attracting greater numbers of visitors.

They wanted to be thoughtful about how the quality of life for residents can be balanced with the quality of the visitor experience; about the kinds of visitors who would most appreciate the city’s character, its people, and its offering; and how we they could responsibly grow the tourism industry for the benefit of all. That’s why, in 2016, they began the transition toward becoming a Destination Marketing and Management Organization, and why they embarked on a journey to create their first Tourism Master Plan.

As a result, Travel Portland engaged the tourism strategy team led by Richard Cutting-Miller, now Vice President, Tourism Strategy for CSL to facilitate and produce a tourism master plan for Portland. The project engaged hundreds of stakeholders and citizens and pointed the way to three broad areas of focus and 10 action items for going forward:
EXPERIENTIAL ASPECTS OF OUR OFFERING, WHICH STRENGTHEN AND PROTECT THE FUNDAMENTAL, AUTHENTIC CHARACTER OF PORTLANDERS

1. AUTHENTICITY: Tell genuine, compelling stories about the destination in narratives that will inspire the Ideological Traveler, Sophisticated Wanderer, Cultural Vanguard and the Authentics we wish to attract.

2. CULTURAL DIVERSITY AND COMMUNITY ENGAGEMENT: We will bring fresh voices, perspectives, and experiences to Portland tourism by making diverse populations part of the industry and the tourism story.

3. MAKERS' MOVEMENT: Portland's artisanal manufacturing economy, from beer to soap, clothing to food, has made the city a global magnet and symbol. We will further nurture this identity and make it central to the Portland story.

4. NEIGHBORHOOD BUSINESS DISTRICTS: Portland's neighborhood culture is dynamic and differentiated; by engaging with SMEs for tourism marketing and product development, we will grow both the tourism offering and neighborhood businesses.

DEVELOPMENT / INVESTMENT ASPECTS, WHICH PRIORITIZE THE KINDS OF EVENTS AND NEW EXPERIENCES WE WANT TO CREATE AS A CITY

5. TOURISM DEVELOPMENT FUNDS: The Tourism Master Plan contains ten shortlisted ideas and numerous projects. Development funds will advance projects in tandem, vetting and readying them for major investment down the road. Funding for the next big thing might be here.

6. FESTIVALS & EVENTS PLUS SIGNATURE EVENTS: The need is to coordinate efforts and create a strategy for creating, incubating, developing, and facilitating beloved Portland events and festivals. That'll help locals understand and benefit from them and attract new visitors. And it's time to contemplate the creation of a signature event.

7. JAMES BEARD PUBLIC MARKET PLUS RESTAURANTS: The food scene is critical to authentic Portland: we need to nurture restaurateurs and their ecosystem so they can stay in place and focus on the food. The opportunity is to meaningfully celebrate both a founding father of American cuisine and the ingredients that make Portland's very special American food story possible.

ADVOCACY, THE LARGER CAUSES IN WHICH TRAVEL PORTLAND WILL ACTIVELY ENGAGE AS AN ORGANIZATION

8. VULNERABLE COMMUNITIES: The quality of life of residents, visitors, and vulnerable communities themselves can only degrade if solutions are not sought to address the plight of people who require shelter and treatment. Vulnerable communities is a local, regional, and national issue, one in which Travel Portland can take a leading role, working with other destinations to compare experience, study helpful practices and find solutions that can benefit other cities as well.

9. TOURISM TRANSPORTATION: As congestion in the city and region increases—affecting daily life for locals and visitors—Tourism Portland will encourage the study of the way visitors move about the city and region, and the adoption of alternate transportation options that will benefit both.

10. THE GREEN LOOP: Portland's Green Loop, which is both in process and still on the drawing boards (for some sections), promises to be a game-changer for resident transportation to and from work, play and recreation, and will be an important new tourism experience that provides both transportation and sightseeing to and from home-bases, neighborhoods, and visitor activities.
A Tourism Master Plan serves a range of purposes: it creates a consensus between the stakeholders who participate in decision-making on tourism-related development for the City; it helps investors and businesses understand where they could be putting their energies as the vision for tourism Portland is realized; and it helps all audiences understand and close the gap between what visitors and residents of Portland wish to experience (the "demand side" of the equation) and those—like Travel Portland and policy makers at the City, State and Federal Government levels who can create and offer them ("the supply side").

This Tourism Master Planning project has given Travel Portland and hundreds of public and private sector stakeholders an opportunity to review and understand the history, current results, future plans and target market of Portland tourism within the context of the broader economy, economic development, and quality of life, and to embark on a detailed examination of its characteristics, visitor profile and market prospects.

To serve as a foundation for the Tourism Master Plan, the project team undertook a series of research activities including:

- Synopsis of consumer research and ‘ideal’ guests analysis
- Summary of relevant travel and tourism trends that may influence target audiences
- Summary of feedback from strategic conversations with key stakeholders
- Differentiators of the destination versus its competitive set
- Summary of visitor appeal and product readiness assessments
- Fit between key travel market segments and the Portland product

The results and information from this research were then used in two industry workshops to gain broad input and envision/develop priorities on tourism opportunities and challenges that might be addressed by the Tourism Master Plan. The first industry workshop was held with Portland’s public and private sector tourism marketing experts to define the Visitor of the Future, while the second industry workshop examined 8 general themes and 40 individual opportunities to consider how these might deliver on the "Portland Visitor of the Future" and inform Portland’s travel and tourism, economic development and place making strategy.

Following the workshops, the penultimate step in the project was to collect feedback from a broad group of stakeholders thru an Open House / Online Forum that summarized the input and ideas collected in the workshops with respect to:

- Consensus summary of key strengths, weaknesses, opportunities, and threats concerning Portland’s destination development in the decades ahead.
- Prospective ideas and positioning strategies to express Portland’s community DNA and competitive identity.
- Potential innovative niche economic and business development strategies for consideration.
- Possible urban design and placemaking initiatives and concepts to help develop and foster a unique and compelling sense of place.

The Open House and Online Forum were open for 2 days and 4 weeks respectively in conjunction with an online survey, to answer questions and collect input from Portland stakeholders and residents with respect to preferences and priorities in order to agree on the final recommendations included in the final report.

The result? Clarity on what’s important, on our strategy and positioning, and an action plan to bring it all to life.

REPORT | A copy of the complete report is available here.
VISIT TUCSON

TOURISM MASTER PLAN 2019

In the 10-year Tourism Master Plan for Metro Tucson, the tourism strategy team led by Richard Cutting-Miller consulted widely to create comprehensive recommendations and a roadmap to realize a positioning of the destination as an international hub of well-being and wisdom—tapping into Tucson's historic roots as an innovative spa destination and leveraging a progressive, spirited character.

The Tourism Master Plan for Metro Tucson initially focused on five research activities. These five pieces of research, which were reviewed and critiqued by a Steering Committee of community leaders and industry stakeholders, led to important insights that were considered in the development of a future vision for Metro Tucson as a destination and the resulting Tourism Master Plan that was developed by this project.

STAKEHOLDER ENGAGEMENT

IDENTIFYING STRATEGIC ISSUES AND OPPORTUNITIES FOR METRO TUCSON

The tourism strategy team met with approximately 50 stakeholders in 25 sessions during August 2018 and additional calls held in September. The primary purpose of these discussions was to identify participant opinions, aspirations, and ideas (issues and opportunities) for the future of Metro Tucson as a destination for visitors and place for residents to live, work and play.
OPINIONS AND PERCEPTIONS OF PREVIOUS VISITORS AND RESIDENTS ABOUT THEIR EXPERIENCES IN METRO TUCSON

The tourism strategy team surveyed 972 English speaking visitors and 709 Spanish speaking visitors to understand who the current Metro Tucson visitor is, how they compare to U.S. travelers in general and what types of travelers and residents might be attracted to the destination in the future. The survey was also used to assess the quality of and satisfaction with current destination services, accommodations, and amenities; and create a segmentation analysis to better understand the Metro Tucson guests and residents and how they differ from U.S. travelers in general.

DESTINATION ASSESSMENT

BENCHMARKING METRO TUCSON EXPERIENCES VS 14 OTHER DESTINATIONS (ACTUAL AND ASPIRATIONAL)

The tourism strategy team conducted a quantitative assessment of Metro Tucson's destination assets and experiences, utilizing a combination of social media reviews and core performance statistics collected directly from TripAdvisor and Yelp. This research benchmarked both the quantity of Travel & Tourism assets and the quality of these experiences against 14 competing and aspirational destinations. The focus of this activity was to understand what visitors are saying about Metro Tucson's products and what they compare online about Metro Tucson and 14 other destinations when making their travel plans.

COMMUNITY SURVEY

OPINIONS AND PERCEPTIONS OF RESIDENTS ABOUT KEY ISSUES AND OPPORTUNITIES FOR METRO TUCSON

In consultation with Visit Tucson staff, The tourism strategy team developed an online survey to identify and gauge residents' perceptions on a variety of key characteristics with respect to livability, culture, economy, and sense of place. The survey was extensively promoted via social media platforms and email to the databases of a variety of public and private organizations as introduced by Visit Tucson staff.

The survey questions were designed to:
- Assess the quality of and satisfaction with current services, accommodations, and amenities throughout Metro Tucson;
- Identify hidden assets that may offer potential for increasing residents' quality of life and tourism growth;
- Assess the relative attractiveness of different new amenities and improvements under consideration for Metro Tucson;
- Inform project decisions for stakeholders and prioritize opportunities for the region;
- Assess the impact of key issues (current) and opportunities (future) on residents' quality of life; and
- Engage residents in the development phase to accelerate the approval and design process for permanent changes in the future.
UNDERSTANDING THE RETURN ON INVESTMENT (ROI) ON METRO TUCSON FESTIVALS & EVENTS

The objective of the Festivals & Events Analysis was to assess the quantity, quality, calendar distribution (scheduling), resident and visitor attendance / satisfaction, diversity (interest group), current results (attendance, income, reviews), future viability / opportunity for growth, and economic impact of Metro Tucson’s existing events.

The data source for the Festivals & Events Analysis was Visit Tucson’s calendar of 227 events against which each listing was scored across 7 categories of “Event Impact” based on publicly available information and the consultant’s expert opinion.

- Economic Impact
- Scalability
- Tourism Potential
- Brand Alignment
- Uniqueness
- Seasonality
- Social / Cultural

VISIONING WORKSHOPS

The results and information from these five research activities were then used in two visioning workshops and one Board of Directors meeting, to gain broad input and envision / develop priorities for Metro Tucson opportunities and challenges that might be addressed by the project.

RECOMMENDATIONS / ROLES & STRATEGIES

The results of the two workshops were then compiled into a Draft Recommendations Report, which was presented to the Project Steering Committee and the Visit Tucson Board of Directors for consideration, feedback, and comments. The Metro Tucson 10-Year Tourism Master Plan Recommendations and Roles and Strategies are the result of this effort.

PRIORITIES & IMPLEMENTATION

A long-term plan such as this can be a little overwhelming when taken as a whole. It is for this reason that a Priority Analysis has been included at the end of the document to guide Visit Tucson and its partners in developing their annual plans and resources necessary to move this Plan forward to implementation.

FESTIVALS AND EVENT ANALYSIS

DUSK Music Festival

Colossal Cave Mountain Park
The analysis and engagement led to six strategic areas of focus and the individual recommendations that were interwoven and informed one another:

1. WELL-BEING
Focusing on the visitor experience by managing all destination and tourism product development activities for Metro Tucson.
- Capital of Well-Being
- Health Well-Being - Medical Tourism
- Intellectual Well-Being - Higher Education and Lifelong Learning
- Physical Well-Being - Biking Tourism
- Physical Well-Being - Sports Tourism
- Spiritual Well-Being - Outdoor Experiences

2. PLACEMAKING
Visit Tucson will create, enhance, and deliver destination products and services, activities and events that preserve and create a high quality of life experience for residents that reflects the unique environment, culture, and diversity of Metro Tucson.
- Downtown Tucson
- Gathering Place
- Community Villages, Main Streets and Downtowns

3. CONNECTIVITY
Organizing the movement of residents and visitors into, out of and around Metro Tucson.
- Connectivity, Accessibility and Proximity
- Airlift Development
- The Loop

4. CULTURE
Celebrating Metro Tucson's history, heritage, and culture.
- City of Gastronomy Activation
- Events & Festivals
- Native American Experience
- Spanish-Speaking Visitor Experience

5. DEVELOPMENT / INVESTMENT
Delivering a quality experience for our visitors via major infrastructure or large-scale projects.
- Full-Service, Downtown and Headquarter Hotel(s)
- Tucson Convention Center
- Technology and Tourism
- Experience Hothouse
- Economic and Workforce Development
- Visit Tucson

6. ADVOCACY
Serving as the industry voice, champion, and conduit for a broader portfolio of policy, programs and opportunities that affect Metro Tucson as a visitor destination and a place to live.
- Meetings and Conventions Business and Economic Development
- Neighborhood / Community Development
- Basic Infrastructure
- Sustainable Tourism

A Priority Analysis was created to guide Visit Tucson and its partners in developing their annual plans and resources necessary to move the plan forward to implementation.

REPORT | A copy of the complete report is available here.
3.1.3 ORGANIZATIONAL CHART

Below is a copy of the CSL Organizational Chart including 34 full time employees.

Below is a copy of the Project Organization Chart including sub-contractors.

CSL PROJECT TEAM

- RICHARD CUTTING-MILLER
- JOHN KAATZ
- SCOTT ERICKSON
- TYLER OTHEN
- GREGORY L. DESMIELDS
- YVONNE E. BRAYTON
- RANDY DURBAND
- KATHLEEN PITTMAN
- SOPHIA NELSON
- JEANETTE GORDON
3.1.4 PROJECT TEAM

We commit the highest level of dedication from some of the world’s leading tourism master planning, tourism branding and marketing strategy, tourism sustainability, DEI, and Palm Beach County project organizers.

UNMATCHED STRENGTHS AS TOURISM STRATEGY ADVISORS

1. UNIQUE MIX OF EXPERTISE:
The international project team led by Richard Cutting-Miller (Vice President, Tourism Strategy, CSL) will provide the Plan with the expertise necessary for fully addressing the depth and breadth of issues and opportunities to sustainably grow the tourism sector in ways uniquely tied to the region.

2. DESTINATION-SPECIFIC, STATE, NATIONAL AND INTERNATIONAL EXPERIENCE:
Members of our Project Team have years of experience working in the County, throughout the State of Florida, throughout the country, and in other markets large and small in the US and around the globe.

3. GLOBALLY TRUSTED DATA & METHODOLOGIES:
Our team has worked with destinations around the world on providing data and conducting research required to effectively manage and grow a destination’s tourism brand and market capture.

4. UNDERSTANDING OF TODAY’S & TOMORROW’S TRAVELERS:
The CSL project team has continued to deliver strategies for the evolution of placemaking, event facilities, attraction concepts, sales & marketing resources, and other factors that need to be addressed to cater to a changing traveler base.

5. IN THE MARKET:
For all our clients, we stress an on-the-ground approach, meeting with hundreds of stakeholders and visiting every corner of the destination. Our tourism experts will spend extensive time in-market throughout the process of creating the Tourism Master Plan for Palm Beach County.
3.1.5 PROJECT TEAM DESCRIPTIONS

RICHARD CUTTING-MILLER
VICE PRESIDENT, TOURISM STRATEGY, CSL INTERNATIONAL

Richard has produced more than 100 Strategic Plans for tourism-focused economies (national, state, and municipal). A 30-year travel industry veteran, Richard was most recently Executive Vice President at Resonance Consultancy where he led the Tourism Strategy Consulting Practice from 2012 to 2021. Richard’s most recent tourism strategy work includes the Tourism Master Plans for the City of Los Angeles, Portland OR, Tucson AZ, Vancouver BC and many more. Richard will serve as lead consultant for the Palm Beach County Tourism Master Plan.

JOHN KAATZ
PRINCIPAL, CSL INTERNATIONAL

Mr. Kaatz’s experience includes in-depth analyses for over 500 tourism development planning, convention, hospitality, and entertainment industry projects. The results of these planning studies have been used to assist public and private sector entities in preparing focused plans for engaging both existing and new visitor segments, defining visitor-generating investment in product and experiences, and addressing gaps in visitor industry infrastructure. John has led numerous Tourism Master Plan efforts including Palm Springs CA, Lexington KY, and Augusta GA. John will serve as principal consultant for the Palm Beach County Tourism Master Plan.

SCOTT ERICKSON
TOURISM MARKETING STRATEGY, CSL INTERNATIONAL

A global marketing leader, Scott has worked across startup and established organizations to craft marketing and brand initiatives that drive awareness, engagement, and advocacy. Scott manages destination marketing projects and works alongside DMOs, economic development and regional marketing teams to craft integrated and sustainable promotion strategies. Drawing on decades of insight, he tailors the approach and solutions for each project to customize marketing strategies as unique as each destination. Scott will serve as chief tourism marketing strategist for the Palm Beach County Tourism Master Plan.

TYLER OTHEN
PROJECT MANAGER, CSL INTERNATIONAL

Mr. Othen has served as Project Manager for over 120 visitor industry development studies spanning a wide range of market sizes across the country. He has led efforts to provide solutions and creative recommendations for destination product development, sales, and marketing efforts, identifying market and financial support for visitor industry product investment, conducting analysis of destination development best practices, conducting destination policy and performance analysis, and assisting in the design of policy and/or product development implementation efforts. Tyler will serve as project manager for the Palm Beach County Tourism Master Plan.

RANDY DURBAND
CEO, GLOBAL SUSTAINABLE TOURISM COUNCIL (GSTC)

Randy Durband is the Chief Executive Officer of the Global Sustainable Tourism Council (GSTC), a UN-created NGO that establishes and manages global standards for sustainability in travel and tourism. The GSTC Criteria include guidelines for minimizing negative environmental, cultural, and social impacts while maximizing travel and tourism as a force for good. Randy will serve as lead sustainability subject matter expert for the Palm Beach County Tourism Master Plan.

CEO, GLOBAL SUSTAINABLE TOURISM COUNCIL (GSTC)
KATHLEEN PITTMAN
PROGRAM DIRECTOR FOR THE CARIBBEAN AND SPECIAL PROJECTS, GLOBAL SUSTAINABLE TOURISM COUNCIL (GSTC)

Kathleen Pittman manages an international economic development consultancy helping companies and communities build mutually beneficial partnerships, programs, and policy. Kathleen helps governments to design legislation and programs to attract and retain businesses, and effect equitable economic development in collaboration with corporate and nonprofit partners; large companies to identify local issues of business interest, local partners, and make investments in places where they do (or want to do) business; small businesses to navigate regulatory landscapes, access capital, build capacity, and better connect to customers; and NGOs to design and manage impactful programming in communities. Kathleen will serve as sustainability subject matter expert for the Palm Beach County Tourism Master Plan.

GREG DESHIELDS
EXECUTIVE DIRECTOR, TOURISM DIVERSITY MATTERS

Qualified Tourism/Hospitality and Academic Professional Certified Hospitality Educator (CHE) proficient in developing and implementing plans, strategies, and initiatives specifically designed to raise destination’s image for diverse, multicultural travel. Experienced Certified Diversity Executive (CDE) with demonstrated cultural competence. Prepared to strategically position an organization to remove systemic barriers to inclusion, lead culture change, and transform the brand. Greg will serve as lead DEI subject matter expert for the Palm Beach County Tourism Master Plan.

YVONNE E. DRAYTON
CDE, DIRECTOR OF OPERATIONS, TOURISM DIVERSITY MATTERS

Yvonne E. Drayton, CDE is the director of operations for Tourism Diversity Matters (TDM), an organization committed to empowering the tourism and hospitality industry to change and evolve, and advocates for an inclusive and diverse workforce and guest experience. As director of operations Yvonne develops, maintains, and evolves strategic partnerships and creates strategies to support the organization’s workforce development efforts, which include the national apprenticeship program. Yvonne will serve as DEI subject matter expert for the Palm Beach County Tourism Master Plan.

SOPHIA A. NELSON
PRESIDENT/CEO, S.A.NELSON & ASSOCIATES

Sophia’s career spans over 25 years of public and private involvement which allows her to have a unique point of view in today’s modern world of communications. Sophia is President/CEO of SANelson and oversees the day-to-day operations, business development, public involvement, and government/community relations. She is a longtime community strategist, entrepreneur, and motivator. Sophia will serve as the onsite project manager and stakeholder engagement manager for the Palm Beach County Tourism Master Plan.

JEANETTE GORDON
DIRECTOR OF COMMUNITY IMPACT, S.A.NELSON & ASSOCIATES

Jeanette has been helping South Florida communities advocate for and implement change. Jeanette will serve as an onsite project coordinator for the Palm Beach County Tourism Master Plan.
Richard has produced more than 100 Strategic Plans for tourism-focused economies (national, state, and municipal) ranging from China to South Carolina, the United Kingdom to Hawaii, the Caribbean to San Luis Obispo County CA, South Africa to Richmond VA.

A 30-year travel industry veteran, Richard was most recently Executive Vice President at Resonance Consultancy where he led the Tourism Strategy Consulting Practice from 2012 to 2021.

**REPRESENTATIVE CLIENTS:**

- **CITY OF LOS ANGELES TOURISM MASTER PLAN** - The City of Los Angeles Department of Convention and Tourism Development selected the Resonance team, led by Richard Cutting-Miller, via an international RFP competition to develop a Tourism Master Plan to assist the City in delivering a positive visitor experience, while also enhancing the quality of life for residents. The 18-month project, the largest ever of its kind in the United States, included six pieces of customized research, numerous visioning workshops, seven strategic areas of focus and 22 long-term recommendations for enhancing the City of Los Angeles as a world leading tourism destination and place to live, work and play.

- **PORTLAND (OR) TOURISM MASTER PLAN** - Richard led a two-year effort commissioned by Travel Portland to facilitate and produce a tourism master plan that engaged hundreds of stakeholders and citizens and pointed the way to three broad areas of focus and 10 action items for moving tourism in this premier destination forward for the next ten-years.

- **RICHMOND REGIONAL 2030 (TOURISM MASTER PLAN)** - Resonance was selected by RRT as a partner to develop a 10-year Tourism Master Plan for the five-county region of Richmond, Virginia. The Resonance team, managed by Richard, was chosen in large part for the breadth of its experience, as well as its commitment to fostering community, preserving cultural heritage, protecting the environment, and generating economic benefits for all those involved.

- **EXPERIENCE SLO CAL 2050 (DESTINATION MANAGEMENT STRATEGY)** - Visit SLO CAL engaged Resonance, led by Richard, to assist leaders across San Luis Obispo County, California to take a step back to purposefully consider what type of destination they would like the county to become in the future. The project helped stakeholders across the county work together to advance common economic, social, environmental, and cultural goals.

- **VANCOUVER (BC) TOURISM MASTER PLAN** - A joint effort of the City of Vancouver, Tourism Vancouver, Vancouver Economic Commission, and the Vancouver Convention Centre. The project led by Richard assessed and defined the tourism product development needs of Vancouver.
Mr. Kaatz's experience includes in-depth analyses for over 500 tourism development planning, convention, hospitality and entertainment industry projects. The results of these planning studies have been used to assist public and private sector entities in preparing focused plans for engaging both existing and new visitor segments, defining visitor-generating investment in product and experiences, and addressing gaps in visitor industry infrastructure. John will help lead the Study effort and will be a primary client contact with project representatives. He will participate in all field research and will help present draft and final study results. In recent years, John has led numerous Tourism Master Plan efforts including the following:

- **A DESTINATION STRATEGIC PLAN FOR LEXINGTON, KENTUCKY** – The Plan presents a set of initiatives focused on enhancing existing and developing new attractions, districts, programs, infrastructure and other relevant community-wide visitor industry assets to sustain and grow the tourism sector over the next ten years. Key recommendations included creating enhanced visitor connections to regional assets such as the Bourbon Trail, horse farms and outdoor adventure through the development of added tour operations, bike trails, and greater promotion. The Plan also focused on more diverse, unique and authentic dining mix in downtown Lexington; the continued re-purposing of historic properties throughout the area into tourism and quality of life assets such as breweries, distilleries, indoor sports, and artist lofts; and the development of a citywide music festival.

- **DEVELOPING THE DESTINATION ASSET STUDY FOR GRAND RAPIDS, MICHIGAN** – The study helped guide Grand Rapids stakeholders by formulating and recommending strategies in order for Grand Rapids to gain market share in the tourism sector, increase hotel bookings and drive exposure to new markets for both the leisure and group sectors. The Study continues to serve as a valuable tool in helping to shape the vision of the destination by identifying opportunities for better leveraging the Grand River in the downtown area, enhancing outdoor adventure assets, improving tourism sector cultural diversity and equity, adding amateur and professional sports assets, and improving visitor industry transportation.

- **A DESTINATION BLUEPRINT FOR AUGUSTA, GEORGIA** that guides local leadership in reaching short- and long-term visitor industry goals in the midst of the area’s evolving economic and demographic landscape. The resulting Blueprint prioritized development initiatives designed to address gaps in the Augusta destination product, including enhancement of the downtown’s connection to the Savannah River, development of regional outdoor adventure assets, creating visitor-generating festival concepts, and creation of new economic development entities to guide tourism-related development.

- **DEVELOPING THE PALM SPRINGS TOURISM INDUSTRY MASTER PLAN** – The Master Plan represents a first-time collaborative and comprehensive strategic plan for growing the tourism industry in the Palm Springs area, identifying need areas and implementing strategies for enhancing the visitor appeal of the destination. The Plan assembled alliance opportunities among each of 9 separate cities in the region to grow tourism.
SCOTT ERICKSON
MARKETING STRATEGY

A global marketing leader, Scott has worked across startup and established organizations to craft marketing and brand initiatives that drive awareness, engagement, and advocacy. From Russian TV advertising, to social media in Latin America, to launching products simultaneously around the globe, Scott’s experience infuses creative intuition with real-world practicality.

For CSL International, Scott manages destination marketing projects and works alongside DMOs, economic development and regional marketing teams to craft integrated and sustainable promotion strategies. Drawing on decades of insight, he tailors the approach and solutions for each project to customize marketing strategies as unique as each destination.

Scott’s background in omnichannel marketing, consumer research, brand development and design are central to his holistic approach to destination marketing and placemaking.

With an academic background spanning International Affairs, Executive Management and Hospitality Marketing, Scott continues to advise and lecture on international marketing and brand strategy. He holds a US patent on brand design, serves as a startup advisor and consults students, companies, and boards on effective strategies for growth.

REPRESENTATIVE CLIENTS
- Finger Lakes Wine Country Marketing Strategy, Finger Lakes, NY
- South Bend / Elkhart Regional Marketing Strategy, South Bend, IN
- East West Hospitality Marketing Analysis, Vail, CO
- Jacksonville Tourism Marketing Strategy, Jacksonville, FL
- Lynchburg Tourism Marketing Strategy, Lynchburg, VA
- Quad Cities Marketing Assessment and Strategy, Quad Cities, IA and IL
- Kohanaiki Brand Assessment, Kona HI
- Four Seasons Resort Hualalai Marketing Strategy, Hualalai, HI

EXPERIENCE
Marketing Strategy Consultant, CSL International: 2023 – present
Chief Marketing Officer, Picnic: 2021-2023
Vice President, Marketing Strategy, Resonance Consultancy: 2019 - 2021
CEO, Manufaktur Marketing, Seattle / New York: 2016 - 2019
Partner & General Manager, Microsoft, Seattle: 1997 - 2016

EDUCATION
Bachelor of Arts (International Affairs), University of Puget Sound, Tacoma, Washington, USA
Executive Marketing, Kellogg School of Management, Northwestern University
Hospitality Marketing, School of Hotel Administration, Cornell University
Mr. Othen has served as Lead Analyst or Manager for over 120 visitor industry development studies spanning a wide range of market sizes across the country. He has led efforts to provide solutions and creative recommendations for destination product development, sales and marketing efforts, identifying market and financial support for visitor industry product investment, conducting analysis of destination development best practices, conducting destination policy and performance analysis, and assisting in the design of policy and/or product development implementation efforts.

Tyler has managed the development of several recent destination strategic plans for CSL, including the Tourism Master Plan for Lansing (MI), the Destination Blueprint for Augusta (GA), the Destination Development Plan for Lexington, the Destination Development Plan for Greater Palm Springs (CA), and the Tourism-Related Feasibility Study for Downtown Scottsdale (AZ). Tyler has been responsible for generating and analyzing research and formulating initial recommendations for each of our projects. He has also recently managed several other visitor and convention projects in a wide variety of markets including the Convention Center Expansion Feasibility Study for Vancouver, (WA), as well as studies in Greenville (SC), Biloxi, San Jose, Fort Wayne, Cleveland, Toronto, Henry County (GA), Oakland, Sacramento, West Palm Beach, and Phoenix.

REPRESENTATIVE CLIENTS:
- Tourism Development Plan - Bradley, IL
- Tourism Master Plan - Evansville, IN
- Convention Center Expansion Feasibility Study - Vancouver, WA
- Tourism Master Plan - Lansing, MI
- Destination Blueprint - Augusta, GA
- Downtown Tourism Plan - Scottsdale, AZ
- Destination Strategic Plan - Lexington, KY
- Convention and Destination Strategic Planning - Grand Rapids, MI
- Destination Esports Strategic Plan - Broken Arrow, OK
- Destination Development Plan - Greater Palm Springs, CA
- Convention Center and Amateur Sports Feasibility Studies - Eugene, OR
- Convention Center Expansion Feasibility Study - Bellevue, WA
- Amateur Sports Destination Plan - Fairfax County, VA
RANDY DURBAND
CEO@GSTCOUNCIL.ORG

PROFESSIONAL EXPERIENCE

- GLOBAL SUSTAINABLE TOURISM COUNCIL (GSTC) - Chief Executive Officer March 2014-present; member of Board of Directors and Chair of Market Access Working Group, 2012-2014. GSTC was created by UNEP and UNWTO to manage global standards for sustainable tourism.

- INTERNATIONAL LABOR ORGANIZATION (ILO) - Technical advisor to community-based, small-enterprise based, and sustainable tourism development projects in Vietnam and Lao PDR, 2011-2013

- TRIP TRAVEL GRANTS, WILTON, CONNECTICUT USA FOUNDATION, 2009-2014, supported UNESCO, ICOMOS, and other tourism development projects in Vietnam, Lao PDR, Cambodia, Guatemala, Peru, Jordan, and USA; focus on cultural heritage tourism development and poverty reduction through tourism

- UNESCO - Technical advisor to sustainable tourism development project in Quang Nam Province, Vietnam in and around the three UNESCO areas of Hoi An World Heritage Site, My Son World Heritage Site, and Cham Islands UNESCO Biosphere 2010-2014


- INTRAV & CLIPPER CRUISE LINES, ST. LOUIS, MISSOURI, President (MD), 2007-2008. Led the strategic direction and global business operations of both brands, including land-based tours and boutique small-ship cruising and riverboat operations, and integration into TUI Travel.

- TAUCK WORLD DISCOVERY, NORWALK, CONNECTICUT, 1986-2004, Executive Vice President and member of Executive Committee, Leader and creator of Brand Steering Committee; Yield Management and small-ship cruise charters; Guest Relations, developed highly profitable travelers' insurance program; measured customer satisfaction and developed feedback loops; Online Marketing and CRM development; Director of Tour Director Resources, managed staff of 250 tour directors worldwide and transformed staff to global operations


EDUCATION

- Master of Arts, 1985. East European Studies, University of Michigan. Ann Arbor, Michigan, USA
- Certified Travel Counselor (CTC), 1994. The Institute for Certified Travel Agents (ICTA), Boston, Massachusetts, USA

PROFESSIONAL AFFILIATIONS AND ACTIVITIES

- Global Sustainable Tourism Council (GSTC) 2013-present
- Sustainable Travel International (STI) 2010-2012
- Global Exchange and its Reality Tours Program 2005-2011
- European Tour Operators Association (ETOA) 1998-2003

JUDGE FOR SUSTAINABLE TOURISM AWARDS:

- World Travel & Tourism Council (WTTC) Tourism for Tomorrow Awards, several years
- UNEP/EU Switch Asia InSPIRE Awards 2015 (Chief Judge)
- Pacific Asia Travel Association (PATA) Gold Awards, several years 2013-202

COMMITTEES AND ACTIVE MEMBERSHIP PARTICIPATION HAVE INCLUDED:

- Travel Market Advisory Board of the Canadian Tourism Commission (CTC) 2000-2003
- One Planet program of UNEP and UNWTO, active member of the Multi-Advisory Committee of the 10-Year Framework of Programmes for Sustainable Development (MAC)
- Sustainability & Social Responsibility Committee of PATA, the Pacific Asia Travel Association
- Institute for Certified Travel Counselors (ICTA)
- ICOMOS, the International Council on Monuments and Sites, and its International Cultural Tourism Committee (ICTC)
- USTOA, the United States Tour Operators Association
KATHLEEN PITTMAN
KATHLEEN@GSTCOUNCIL.ORG

Experienced Lawyer Focused on Destination Planning, Sustainable Development and Management

EXPERIENCE

AGILE COMMUNITY PARTNERS WASHINGTON, D.C.

FOUNDER AND PARTNER (EXAMPLE CLIENT ENGAGEMENTS BELOW. FULL LIST AVAILABLE ON REQUEST.) 2014-PRESENT

Adviser and Mentor to Small Businesses (2015-Present)
- Provide strategic, organizational, and program support and mentorship for wide range of tourism industry partners.
- Write proposals for small businesses to access funding from international, federal, state, and local grantors.

Adviser and Mentor to Nonprofits and Industry Associations (2016-Present)
- Provide strategic, organizational, and program support and mentorship for organizations supporting destination development in various communities globally and within the U.S.—most recently as a Mentor for tourism organizations in Colorado on behalf of the Colorado Tourism Office.
- Write grant proposals (over $450K raised since 2016) to fuel destination development work.
- Assist nonprofits on key organizational and program management initiatives, including executive transitions, strategic planning, and creation of foundational tools from human resources to program monitoring and evaluation.

World Wildlife Fund, Private Sector Engagement Technical Lead (2016-Present)
- Advise and mentor corporate teams in strategy and implementation to improve sustainability of business practices.
- Manage projects investing corporate funds ($SM over 5 years) in destination development and sustainable tourism.
- Guide businesses through stakeholder mapping and engagement, and selection of local partners for grantmaking.
- Negotiate and draft wide variety of partnership agreements governing complex institutional relationships.

Global Sustainable Tourism Council, Program Director for The Caribbean and Special Projects (2014-Present)
- Lead regional work for standard-setting NGO for sustainable tourism business and destination management practices.
- Build and manage partnerships with governments, businesses, and NGOs.
- Conduct assessments to identify destination needs; engage local stakeholders in planning for sustainable management of tourism. Have conducted or overseen 16 GSTC Destination Assessments globally, including for U.S. counties.

Ministry of Tourism of St. Kitts and Nevis, Adviser.
(2014-Present)
- Advise on wide-ranging policy and programs for destination development and sustainable tourism management.
- Build partnerships locally and internationally to fund and manage destination development programming.

FEDERAL TRADE COMMISSION WASHINGTON, D.C.

ATTORNEY, BUREAU OF CONSUMER PROTECTION 2009-2013
- Managed array of sustainable tourism projects with government, nonprofit, and corporate partners.

O'MELVENY & MYERS LLP WASHINGTON, D.C.

ASSOCIATE ATTORNEY 2005-2009
- Managed extensive caseload of legislative, regulatory, and litigation matters in antitrust (mergers), consumer protection, and energy. Drafted testimony, legislation, litigation materials. Participated in settlement negotiations.

EDUCATION

University of Chicago Law School Chicago, IL; J.D. June 2005
- College of the Holy Cross Worcester, MA; B.A. in Spanish (fluent) and Political Science, Summa Cum Laude May 2001

LICENSES / AFFILIATIONS

- District of Columbia Bar (2005-Present)
- Guest Lecturer, George Washington University School of Business (2015-Present)
- Vice Chair, Bladensburg Road and Rhode Island Avenue Main Streets, NE District of Columbia (2019-2022)
- Juror, World Travel and Tourism Council Tourism for Tomorrow Awards (2015-2019—when award suspended
Gregory L. Deshields, CDE, CHE
EXECUTIVE DIRECTOR, TOURISM DIVERSITY MATTERS

gdeshields@tourismdiversitymatters.org | www.tourismdiversitymatters.org

Qualified Tourism/Hospitality and Academic Professional Certified Hospitality Educator (CHE) proficient in developing and implementing plans, strategies, and initiatives specifically designed to raise destination’s image for diverse, multicultural travel.

Experienced Certified Diversity Executive (CDE) with demonstrated cultural competence. Prepared to strategically position an organization to remove systemic barriers to inclusion, lead culture change, and transform the brand.

Graduate of Johnson & Wales University Providence, Rhode Island, with an A.S. Degree in Hotel & Restaurant Management; and a B.S. in Hospitality Management.

CERTIFICATIONS
University of South Florida Muma College of Business Ethical and Inclusive Leadership and Diversity, Equity, and Inclusion in the Workplace Certificate

PROFESSIONAL DEVELOPMENT LEADERSHIP GRADUATE

AWARDS AND HONORS:
Boy Scouts of America the Hospitality “Good Scout” Award, 2022 Black Meeting and Tourism Apex Award, 2022 Pride Power 100 Most Influential Pennsylvania LGBTQ, 2022 Camden County Board of Commissioners Martin Luther King, Jr. Freedom Medal, 2022 PhocusWire Mover’s and Shakers, 2021 Event Industry Council: Social Impact Award and 2021 Philadelphia Tribune Most Influential African American Leaders

PROFESSIONAL AFFILIATIONS:

PROFESSIONAL CERTIFICATIONS:
Society of Diversity - Certified Diversity Executive (CDE), American Hotel & Lodging Association, Educational Institute - Certified Hospitality Educator (CHE), and CultureBrokers® LLC - Licensed Diamond Inclusiveness Assessment Provider. Asian American Hotel Owners Association - Certified Hotel Owner (CHO)

Greg is a longtime Tourism and Hospitality professional, a native Philadelphian with a passion for his work, and is dedicated to giving back to the next generation of hospitality leaders.

Frequent presenter, specific Diversity, Equity, and Inclusion Fundamentals: Assessment, Planning, Strategies, and Implementation to reinforce the need for organizations to lead inclusion from the top.
YVONNE E. DRAYTON, CDE

SUMMARY
Creative professional with extensive experience building revenue through concept to implementation. Savvy leader and team player adapt at generating partnerships and managing successful projects from design to drive revenue and deliver successful brand-focused outcomes. Skilfully manage budgets and control costs to exceed organizational goals. Core competencies include:

- Diversity & Inclusion Certificate, Cornell University
- Certified Diversity Executive (CDE), Society for Diversity
- Diamond Inclusiveness Certified Facilitator, CultureBrokers, LLC

SELECTED ACHIEVEMENTS
- Conduct culture analyses and devise strategies for implementation to assist clients by generating value for DEI through the role of data as a strategic asset that guides the evaluation of organizational strengths and weaknesses and builds DEI competencies across the organization to support successful, incremental structural change.
- Lead the national Tourism Diversity Matters Apprenticeship Program providing the framework to build diverse tourism pipeline organizations within the hospitality and tourism industry. Develop collaborative partnerships with Destination Management Organizations to host apprenticeship programs and with state and city economic development entities to support recruitment of potential candidates. Program has garnered 300+ participants with 98% receiving offers for full-time employment upon completion.

EXPERIENCE
- Director of Tourism Development, Visit Philadelphia, PA 2000 - 2010
  - Developed strategic partnership alliances for diverse tourism initiatives. Built relationships with four convention and visitors bureaus; cultural and historical organizations; city planning entities; and a regional marketing corporation across five counties to form a collaborative increasing diversity in branding, marketing, and the interpretation of new and existing tourism products.
  - Directed development of tourism studies and plans focused on new market strategies; identified and directed development and interpretation of new and existing tourism products.
  - Co-facilitated series of training workshops to address cultural sensitivity with staff members from participating historical and cultural sites to improve the visitor experience of new target audiences.

SIX SQUARE AFRICAN AMERICAN CULTURAL DISTRICT
- Designed and facilitated stakeholder and community visioning sessions; developed operational plan to guide newly established organization; created case statement and developed strategic blueprint for future economic development in East Austin, TX, garnering $350,000 in initial sponsorship support.
- Facilitated the writing of grants to obtain state funding totaling $500,000. Directed collaborations with local and state officials and community leaders to obtain financial support for programs reducing conference expenses by an annual average of 30%.
- Planned and executed comprehensive national association management services for conventions attracting 5,000 (January), 45,000 (June), and 30,000 (September) attendees annually.
- Designed and implemented strategic planning sessions with national leadership to develop three-year and five-year plans resulting in the adoption of a new affiliate donation process.
- Developed event planning strategies to align with revenue goals increasing profits 150%. Created event tactics to support organizational objectives focused on corporate and government fundraising goals garnering $250,000.
- Conducted community charrettes to raise awareness and growing attendance by 25%.
- Facilitated the writing of grants to obtain state funding totaling $500,000.
- Directed collaborations with local and state officials and community leaders to obtain financial support for programs reducing conference expenses by an annual average of 30%.
- Planned and executed comprehensive national association management services for conventions attracting 5,000 (January), 45,000 (June), and 30,000 (September) attendees annually.
- Designed and implemented strategic planning sessions with national leadership to develop three-year and five-year plans resulting in the adoption of a new affiliate donation process.
- Directed collaborative efforts with planning team and stakeholders to plan, manage, and direct the execution of two signature fundraising events with a focus on education and social justice advocacy. Successful planning continues to garner increased revenue of 15% annually through corporate donor contributions that support scholarship funds and expand community programming.
- Directed collaborations with planning team and stakeholders to direct annual project management plan incorporating strategies to support annual fundraising, audience development, public relations, and marketing goals that reflect current trends in nonprofit management.

EDUCATION
- Thomas Jefferson University, Philadelphia PA, Bachelor of Science: Marketing
- Pennsylvania Dutch Convention & Visitors Bureau, Pennsylvania Tourism Office
- directed co!aborations with local and state officials and community leaders to obtain financial support for programs reducing conference expenses by an annual average of 30%.
- Developed event planning strategies to align with revenue goals increasing profits 150%. Created event tactics to support organizational objectives focused on corporate and government fundraising goals garnering $250,000.
- Conducted community charrettes to raise awareness and growing attendance by 25%.
- Facilitated the writing of grants to obtain state funding totaling $500,000.
- Directed collaborations with local and state officials and community leaders to obtain financial support for programs reducing conference expenses by an annual average of 30%.
- Planned and executed comprehensive national association management services for conventions attracting 5,000 (January), 45,000 (June), and 30,000 (September) attendees annually.
- Designed and implemented strategic planning sessions with national leadership to develop three-year and five-year plans resulting in the adoption of a new affiliate donation process.
- Directed collaborative efforts with planning team and stakeholders to plan, manage, and direct the execution of two signature fundraising events with a focus on education and social justice advocacy. Successful planning continues to garner increased revenue of 15% annually through corporate donor contributions that support scholarship funds and expand community programming.
- Directed collaborations with planning team and stakeholders to direct annual project management plan incorporating strategies to support annual fundraising, audience development, public relations, and marketing goals that reflect current trends in nonprofit management.

AFFILIATIONS
- Philadelphia Diversity Advisory Board (Chair, Board Development and Nominations Committee) 2018 - 2021
- Philadelphia Diversity Executive Committee Member, 2017 - 2021
- OASIS Community Development Corporation, Board of Directors, 2021 - Present
- First Episcopal District - AME, Philadelphia, PA 2014 - 2016
  - Managed $700,000 budget to produce historic bicentennial celebration, a multi-dimensional special event for 3,100 guests to kick off eight-day international conference.
  - Developed event planning strategies to align with revenue goals increasing profits 150%. Created event tactics to support organizational objectives focused on corporate and government fundraising goals garnering $250,000.
  - Conducted culture analyses and devise strategies for implementation to assist clients by generating value for DEI through the role of data as a strategic asset that guides the evaluation of organizational strengths and weaknesses and builds DEI competencies across the organization to support successful, incremental structural change.
  - Lead the national Tourism Diversity Matters Apprenticeship Program providing the framework to build diverse tourism pipeline organizations within the hospitality and tourism industry. Develop collaborative partnerships with Destination Management Organizations to host apprenticeship programs and with city and state economic development entities to support recruitment of potential candidates. Program has garnered 300+ participants with 98% receiving offers for full-time employment upon completion.
SOPHIA NELSON B.S., M.S., PHD.

EXPERTISE
Statewide relationships with elected officials, community, and civic organizations focused on innovation, creativity, and complete customer satisfaction.

SANELSON, CHIEF EXECUTIVE OFFICER
Sophia A. Nelson, is the driving force behind SANelson & Associates, and a visionary in community engagement. Sophia has orchestrated transformative projects that bridge organizations with the heartbeat of their communities. Sophia’s portfolio is a tapestry of success stories, each project a thread that weaves organizations and communities together. From the annual Jazz in the Gardens a 60,000+ Music Festival project, to her influence The Cordish Companies’ upcoming LIVE! Pompano Beach, branded entertainment districts, where design and customer experiences set a new standard. To collaborating with the Seminole Tribe of Florida's Tribal Community Development, Sophia is crafting the unique and harmonious blend of sustainable growth and cultural respect, to working with Immocorp Capital, a powerhouse in real estate and development her strategic approach didn’t just enhance physical structures; it enriched the very essence of the community’s identity.

Sophia's magic extends to her fostering relationships and understanding community needs, she turned community projects into legacies of progress. These projects aren't just bricks and mortar; they're cornerstones that elevate neighborhoods and economies.

Her work isn't confined to blueprints; it's a blueprint for community growth and prosperity. Sophia A. Nelson is more than an expert - she’s a community matchmaker. With her guidance, organizations embrace their role as community stewards, and communities embrace the potential that these projects bring. Sophia doesn't just engage; she unites, creating a legacy of collaboration that enriches lives, empowers dreams, and shapes brighter futures.

EDUCATION
Walden University, PhD Public Admin & Policy
University of Alabama, MS Criminology Theory
Bethune-Cookman University, BS Pre-Law/Sociology

CERTIFICATIONS
MBE, SBE, WBE, CBE, DBE
JEANETTE GORDON, B.S., M.B.A.

Under Jeanette’s leadership she has deepened the impact of change throughout communities in the South Florida. She is skilled at bring people together across divides to discuss, decide, and act on today’s toughest issues. Jeanette advocates for positive change and a common good. Her professional life has been devoted to helping provide equal access to tools for health, social, and economic well-being.

- Facilitation of resident/community engagement initiatives
- Facilitation of focus groups and feedback loops to insure a common agenda
- Facilitation of collaborative efforts
- Program development & implementation
- Connecting resources and relevant trainings to community-based organizations
- Resident leadership support
- Manage philanthropic funding totaling over 1 million dollars
- Partner in the 2020-2021 Robert Wood Johnson Foundation Culture of Health Prize Winner
- With resident guidance, developed and implemented strategic plan/theory of change
- Overseeing the development of set strategies intended to increase behavioral health outcomes
- Creating and implementing annual funding and sustainability plan
- Overseeing the development and implementation of a shared measurement system using a collect impact model

- Engaging with resident stakeholders to develop community-based behavioral health standards
- Established resident/community led subcommittees which provided direction based on their lived experience
- Established “Healthier Neighbors Mini Grant”, grant making process awarding grant funds to residents, non-profits, and for-profits
- Directed the first county-funded reentry program
- Responsible for all aspects of management reporting, strategic planning, and budgeting, including presentation of program structure and fiscal recommendations to executive levels of management
- Managed a yearly program budget ranging from $300k to $400k
- Analyze, review, and monitor contractual agreements
- Collaborated with outside agencies and obtained grants to further reentry services

EDUCATION

University of Phoenix, School of Business, MBA
Florida Agricultural and Mechanical University, BS

COMMUNITY ACHIEVEMENTS

2022 Top Frontliners and Healthcare Heroes
2020-2021 Robert Wood Johnson Foundation Culture of Health Prize Winner
South Florida’s 50 Most Powerful Black Leaders in Business & Industry - Legacy Magazine, 2020
Community Service Award, Tabernacle Missionary Baptist Church, 2019
Collective Impact Trainer
Level of Service Inventory Revised (LSI-r) Trainer
3.1.7 CONTRACT TERMINATIONS
CSL affirms that no Tourism Master Plans have been terminated either voluntarily or involuntarily, within the past five (5) years.

3.1.8 JUDGMENTS AND LAWSUITS
CSL affirms that there are no judgments or lawsuits currently pending against the proposer or its principals or any lawsuit filed against, or judgment offered against proposer or its principals within the last ten (10) years.
CSL affirms that there are no lawsuits filed by proposer or its principals in the last ten (10) years.

3.1.9 BANKRUPTCY DECLARATION
CSL affirms that neither the proposer or its principals have ever declared bankruptcy, filed a petition in any bankruptcy court, filed for protection from creditors in bankruptcy court, or had involuntary proceedings filed in bankruptcy court.

3.1.10 JOINT VENTURE
The team constructed for this project is a Contractor-Subcontractors team. It is not a Joint Venture team.
3.2.1 PROJECT REQUIREMENTS

The project outlined in the Scope of Work involves the creation of a Tourism Master Plan (TMP) for Palm Beach County, Florida, with the aim of establishing a comprehensive and forward-looking roadmap to enhance the county’s tourism competitiveness and positioning. The plan is expected to align various stakeholders’ interests, guide investment decisions, and bridge the gap between visitor demands and available offerings. The key requirements of the project include:

**BACKGROUND AND GOALS:**
- Develop a long-term visionary roadmap for Palm Beach County’s tourism development, with special attention and recommendations specific to the individual cities, towns, and communities.
- Align stakeholders’ perspectives on tourism-related decisions and development.
- Assist investors and businesses in understanding where to focus their efforts.
- Address the gap between visitor expectations and experiences provided.
- Anticipate future development needs and opportunities.
- Elevate Palm Beach County’s status as a premier destination at state, national, and international levels.
- Promote economic opportunities for residents, enhance infrastructure, and support cultural and sports activities.
- Foster transformational events and advocate for Diversity, Equity, and Inclusion (DEI) and sustainable tourism practices.

**PROJECT SCOPE:**
- Produce a 20-year consensus-based Tourism Master Plan for Palm Beach County and its individual municipalities.
- Assess and build upon existing capacities and strategic plans across industry partners and regions within the county.
- Utilize expertise in destination planning to balance complexities and achieve consensus among multiple public and private stakeholders.

**CORE ISSUES TO ADDRESS:**
1. Enhance marketing, branding, and sales strategies to align with the Tourist Development Council’s goals.
2. Integrate county economic development and planning agencies, municipalities, and regions to establish a world-class destination brand.
3. Recommend key developments, including landmarks, attractions, cultural institutions, sports facilities, events, festivals, and infrastructure.
4. Propose mechanisms for funding these developments.

**KEY PROJECT ELEMENTS:**
1. Conduct a situational analysis, reviewing historical tourism performance, competitive activities, asset maps, strategic plans, SWOT/GAP analysis, impact studies, and relevant future-facing studies.
2. Engage stakeholders through consultations and workshops with officials, industry representatives, and community leaders.
3. Provide recommendations on visitor experience, resident quality of life, community building, destination development, sustainability, and other identified issues.
4. Develop an implementation plan with timelines, metrics, and resources needed to execute key projects and strategies.

**EXPECTED DELIVERABLES:**
1. Deliver a comprehensive report addressing all core issues and key elements.
2. Present the plan to the TDC Board, TDC Agency boards, County Commissioners, and other stakeholders.
3. Offer initial guidance for plan implementation, with the option for further involvement in subsequent phases.
3.2.2 PALM BEACH COUNTY’S UNIQUE ASSETS & NEEDS

Palm Beach County, located in the southeastern part of Florida, is renowned for its diverse and captivating tourism assets. This region offers a unique blend of natural beauty, cultural attractions, and recreational opportunities that make it a prime destination for travelers seeking both relaxation and adventure.

39 MUNICIPALITIES

Palm Beach County includes 39 municipalities (cities, towns, and villages) which have varying parts to play in the County’s travel and tourism ecosystem. Some are primary destinations for tourism, while others are bedroom communities with little direct tourism. No matter their individual role to play, each is impacted by the broader tourism industry in Palm Beach County.

NATURAL BEAUTY

Palm Beach County’s natural beauty is a primary draw for tourists. With its pristine beaches stretching along the Atlantic Ocean, visitors can enjoy sunbathing, swimming, water sports, and stunning sunrises. The county is also home to the breathtakingly lush Florida Everglades, providing opportunities for eco-tours, birdwatching, and wildlife exploration.

CULTURAL ATTRACTIONS

The cultural diversity of Palm Beach County is reflected in its array of attractions. The Norton Museum of Art boasts an impressive collection of art spanning multiple centuries and genres. The Flagler Museum, housed in a historic mansion, offers a glimpse into the Gilded Age, showcasing the opulence of the past. The Morikami Museum and Japanese Gardens celebrate the county’s connection to Japanese culture, while the Kravis Center for the Performing Arts hosts a variety of world-class shows and performances.

OUTDOOR ACTIVITIES

For outdoor enthusiasts, Palm Beach County offers an array of activities. Golfers can choose from numerous championship golf courses set against the backdrop of lush landscapes. The Intracoastal Waterway provides opportunities for boating and fishing, while hiking and biking trails wind through scenic parks such as Okeeheelee Park and John D. MacArthur Beach State Park.

LUXURIOUS ACCOMMODATIONS

Luxury and comfort are paramount in Palm Beach County. The area boasts a range of upscale resorts, boutique hotels, and vacation rentals that cater to the discerning traveler. Many accommodations offer oceanfront views, world-class spas, and fine dining experiences, providing visitors with a truly indulgent escape.

INFRASTRUCTURE ENHANCEMENT

To accommodate the increasing number of tourists, Palm Beach County must invest in its infrastructure. Improving roads, expanding public transportation options, and upgrading airports will enhance the accessibility and overall experience for visitors.

SUSTAINABLE TOURISM PRACTICES

As tourism grows, so does the need for sustainable practices. Palm Beach County should prioritize initiatives that minimize the environmental impact of tourism, such as promoting eco-friendly transportation options, reducing single-use plastics, and implementing conservation efforts to protect natural resources.

CULTURAL PRESERVATION

Preserving the unique cultural heritage of Palm Beach County is vital. The county should support local arts, traditions, and historical sites to maintain its authenticity amidst the influx of tourists. Collaborations with cultural institutions and community organizations can help achieve this goal.

WORKFORCE DEVELOPMENT

As the tourism industry expands, so does the need for a skilled workforce. Offering training programs and educational opportunities in hospitality, customer service, and other relevant fields can ensure that locals are well-equipped to meet the demands of the growing tourism sector.

DIVERSIFICATION OF OFFERINGS

While Palm Beach County is known for its beach resorts and golf courses, diversifying its tourism offerings can attract a broader range of visitors. Investing in adventure tourism, wellness retreats, and niche experiences can help the county appeal to different segments of the market.

DIGITAL MARKETING AND TECHNOLOGY

Embracing digital marketing and technology is crucial for effective tourism promotion. Palm Beach County should invest in a robust online presence, including user-friendly websites, mobile apps, and interactive platforms that provide visitors with comprehensive information and engaging experiences.
Engaging the local community in tourism development is essential for ensuring sustainable growth and positive interactions between tourists and residents. Open dialogues, public forums, and collaborative initiatives can address concerns and incorporate local perspectives into tourism planning.

Palm Beach County’s unique blend of natural beauty, cultural attractions, and recreational opportunities make it a remarkable destination for tourists. By focusing on infrastructure enhancement, sustainable practices, cultural preservation, workforce development, diversification of offerings, digital marketing, and community involvement, the county can capitalize on its assets while addressing its evolving tourism needs. This comprehensive approach, the result of a well-developed Tourism Master Plan, will contribute to the continued success and prosperity of Palm Beach County’s tourism industry.

3.2.3A TOURISM INDUSTRY AND TRENDS

Palm Beach County has long been a sought-after destination for travelers seeking a blend of natural beauty, cultural richness, and recreational experiences. As the tourism industry evolves, it’s crucial to understand the prevailing trends shaping visitor preferences, behaviors, and expectations in Palm Beach County.

SUSTAINABLE AND ECO-FRIENDLY TOURISM
Sustainability is no longer a buzzword; it’s a driving force in the tourism industry. Travelers are increasingly conscious of their impact on the environment and are seeking destinations that prioritize sustainable practices. Palm Beach County, with its diverse ecosystems and natural wonders like the Everglades, is positioned to capitalize on this trend. Investments in eco-friendly transportation, conservation efforts, and responsible wildlife encounters will resonate with environmentally conscious tourists.

WELLNESS AND HEALTH TOURISM
The pursuit of wellness has become a paramount concern for travelers. Palm Beach County’s serene beaches, tranquil gardens, and world-class spas provide an ideal backdrop for wellness-oriented tourism. From yoga retreats to holistic wellness programs, the county can tap into this trend by offering rejuvenating experiences that cater to both physical and mental well-being.

CULTURAL IMMERSION AND AUTHENTIC EXPERIENCES
Modern tourists seek more than just sightseeing; they yearn for authentic cultural experiences. Palm Beach County’s rich history, diverse heritage, and cultural attractions offer ample opportunities for immersive encounters. Embracing local traditions, supporting cultural events, and providing genuine interactions with the community can elevate the visitor experience and create lasting memories.

DIGITAL TRANSFORMATION AND PERSONALIZATION
Technology has revolutionized how travelers plan and experience their trips. Palm Beach County should harness the power of digital tools, from interactive maps to personalized itineraries, to engage visitors throughout their journey. Leveraging social media, virtual tours, and mobile apps can facilitate seamless trip planning and enhance the overall guest experience.

Niche and adventure tourism
Niche tourism segments, such as adventure and experiential travel, are gaining traction. Palm Beach County’s diverse landscapes, water activities, and outdoor adventures provide a playground for adrenaline junkies and thrill-seekers. By promoting activities like kayaking through mangroves, snorkeling in coral reefs, and hiking trails, the county can attract a more adventurous demographic.

CULINARY AND FOOD TOURISM
The gastronomic scene has become a significant draw for travelers, with many seeking to explore local flavors and cuisines. Palm Beach County’s dining options, including farm-to-table experiences and seafood delights, can entice food enthusiasts. Collaborating with local chefs and organizing food festivals can position the county as a food lover’s paradise.

FLEXIBLE AND REMOTE WORK OPPORTUNITIES
The rise of remote work has blurred the lines between business and leisure travel. Palm Beach County can attract a new wave of visitors by promoting itself as a “workcation” destination. Offering reliable Wi-Fi, co-working spaces, and tailored packages for digital nomads can create a symbiotic relationship between work and play.
In the wake of global health challenges, health and safety have become paramount considerations for travelers. Palm Beach County must prioritize visitor safety by implementing rigorous hygiene protocols, clear communication about health measures, and promoting a safe environment. These efforts will reassure tourists and facilitate their travel decisions.

DIVERSITY, EQUITY, AND INCLUSION (DEI)

In today's world, the tourism industry is increasingly recognizing the importance of diversity, equity, and inclusion. Palm Beach County, with its vibrant multicultural makeup and rich heritage, has a unique opportunity to lead in this area. Fostering an environment that celebrates cultural diversity and promotes inclusivity is not only ethically sound but also makes good business sense. By supporting diverse-owned businesses, showcasing local traditions, and ensuring that tourism benefits are equitably distributed among all communities, Palm Beach County can create an environment where all visitors feel valued and represented. Initiatives aimed at promoting DEI in the workforce, local partnerships, and tourism marketing will contribute to a more authentic and enriching experience for every traveler, irrespective of their background or identity.

As Palm Beach County's tourism industry continues to evolve, staying attuned to these trends is imperative. By embracing sustainability, wellness, cultural immersion, digital transformation, adventure experiences, culinary delights, remote work possibilities, health precautions, and DEI focus, the county can position itself as a dynamic and responsive destination. By aligning its offerings with these prevailing trends, Palm Beach County will not only attract a diverse array of visitors but also ensure its lasting prominence in the global tourism landscape.

3.2.3B PALM BEACH COUNTY’S COMPETITION

During the Kickoff Phase of the Tourism Master Plan project CSL will work with the Palm Beach County project team to suggest, consider, and select the specific destinations that will be reviewed in the Benchmarking Phase. Below is a list of directly competitive destinations as well as a list of aspirational destinations that Palm Beach County may want to consider for the benchmarking analysis.

DESTINATIONS DIRECTLY COMPETING WITH PALM BEACH COUNTY

**MIAMI, FLORIDA:** Known for its vibrant nightlife, cultural diversity, and trendy art scene, Miami offers a bustling urban experience and beautiful beaches.

**ORLANDO, FLORIDA:** A major family destination, Orlando is home to world-famous theme parks like Disney World and Universal Studios, attracting millions of visitors.

**FORT LAUDERDALE, FLORIDA:** Just a short drive away, Fort Lauderdale boasts stunning beaches, upscale shopping, and a thriving boating culture.

**KEY WEST, FLORIDA:** Renowned for its laid-back atmosphere, colorful architecture, and water-based activities, Key West draws travelers seeking a tropical getaway.

**NAPLES, FLORIDA:** Known for its high-end shopping, golf courses, and upscale resorts, Naples offers a luxurious and relaxing escape.

**SARASOTA, FLORIDA:** An arts and cultural hub, Sarasota features museums, galleries, and performing arts venues, appealing to those seeking artistic experiences.

**HILTON HEAD ISLAND, SOUTH CAROLINA:** With pristine beaches, golf courses, and nature preserves, Hilton Head Island is a competitor for those seeking outdoor and leisure activities.

**CHARLESTON, SOUTH CAROLINA:** Rich in history and charm, Charleston offers historic architecture, Southern cuisine, and a distinctive cultural experience.

**SAN DIEGO, CALIFORNIA:** With its pleasant climate, diverse attractions, and family-friendly activities, San Diego offers a mix of beach life, culture, and outdoor adventures.
MYRTLE BEACH, SOUTH CAROLINA: Known for its extensive beaches, golf courses, and family-oriented attractions, Myrtle Beach draws vacationers seeking a laid-back coastal experience.

NEWPORT BEACH, CALIFORNIA: An upscale coastal town with stunning beaches, upscale shopping, and a yachting culture, Newport Beach competes for luxury travelers.

VIRGINIA BEACH, VIRGINIA: Known for its expansive beaches, family-friendly attractions, and maritime heritage, Virginia Beach competes for visitors seeking a mix of coastal relaxation and entertainment.

ASPIRATIONAL DESTINATIONS FOR PALM BEACH COUNTY

ASPEN, COLORADO: A high-end ski resort town, Aspen is synonymous with luxury, outdoor adventure, and a refined cultural scene.

MONTEREY, CALIFORNIA: Known for its stunning coastline, world-class golf courses, and the renowned Monterey Bay Aquarium, this destination aligns with Palm Beach County's upscale appeal.

MAUI, HAWAII: Offering breathtaking beaches, diverse landscapes, and a strong focus on wellness and relaxation, Maui sets a precedent for tropical paradise tourism.

MONTEREY, CALIFORNIA: Known for its stunning coastline, world-class golf courses, and the renowned Monterey Bay Aquarium, this destination aligns with Palm Beach County's upscale appeal.

MAUI, HAWAII: Offering breathtaking beaches, diverse landscapes, and a strong focus on wellness and relaxation, Maui sets a precedent for tropical paradise tourism.

SANTORINI, GREECE: This iconic Mediterranean destination epitomizes luxury, romance, and awe-inspiring views, inspiring Palm Beach County to enhance its offerings.

BARCELONA, SPAIN: A city that seamlessly blends culture, architecture, and beach life, Barcelona can inspire Palm Beach County to integrate urban and coastal experiences.

BALI, INDONESIA: Known for its spirituality, stunning landscapes, and holistic retreats, Bali exemplifies wellness and adventure in a tropical setting.

DUABI, UNITED ARAB EMIRATES: A symbol of opulence and innovation, Dubai showcases how a desert destination can transform into a modern hub of luxury and entertainment.

CANNES, FRANCE: Famous for its film festival and luxury tourism, Cannes sets a benchmark for upscale experiences, cultural events, and beachfront allure.

MALDIVES: Famous for its overwater bungalows, crystal-clear waters, and coral reefs, the Maldives can inspire Palm Beach County to enhance its luxury beachfront offerings.

QUEENSTOWN, NEW ZEALAND: Renowned for its adventure tourism, Queenstown offers a plethora of outdoor activities, stunning landscapes, and adrenaline-pumping experiences.

AMALFI COAST, ITALY: With its breathtaking coastline, charming villages, and Mediterranean allure, the Amalfi Coast embodies the essence of coastal luxury.

KYOTO, JAPAN: A city steeped in history, tradition, and natural beauty, Kyoto's blend of cultural experiences and serene surroundings can inspire Palm Beach County to emphasize authenticity and cultural immersion.

Of course, there is an endless list of competitive and aspiration destinations that can be selected for benchmarking, so this list is presented to illustrate some expected and unexpected choices. A final list will be developed in concert with the Palm Beach County project team.
3.2.4 UNIQUE SERVICES/ABILITIES

In reviewing the RFP and the current situation in Palm Beach County we believe there are three unique services/abilities that CSL possesses that are needed to deliver a successful Tourism Master Plan project:

FIRST IS OUR EXPERIENCE AND EXPERTISE IN DELIVERING WORLD CLASS STRATEGIC PLANNING FOR DESTINATIONS.

CSL has performed comprehensive Tourism Strategy work for a variety of communities throughout the world and has designed a proven, industry-leading strategic planning method that has provided aligned projects, strategies, and goals for destinations large and small.

**EXTENSIVE STAKEHOLDER OUTREACH** is a cornerstone of our successful Tourism Strategy process. Our process includes dozens of in-person interviews with key stakeholders and a deep dive into resident perspectives to develop a community-informed launchpad for the direction of our work.

**ASSET EVALUATION** requires thorough online and in-person reviews of existing attractions, event experiences, event facilities, infrastructure, and other destination amenities to help create a baseline from which to identify opportunities for future enhancement. This also includes reviewing and building on past tourism research efforts.

**COMPARABLE BENCHMARKING** includes both broad comparisons of product and marketing with peer destinations and identification of “micro” case study examples of successful destination product, experience, and marketing in other destinations. These exercises are used to discover destination development ideas for our clients.

**OUT-OF-MARKET DEMAND ANALYSIS** takes the observations and ideas from the above tasks and “tests” the feasibility of various product and marketing initiatives for our clients. As feasibility consultants, we conduct extensive outreach to potential users of various destination investments, including travelers, travel writers, event planners, and sports organizers, among others.

**CONCEPT DEVELOPMENT** identifies and details market-tested product and marketing initiatives that should be prioritized by our client destinations in the short-, mid-, and long-term.

**ACTIONABLE PLANNING** puts developed concepts on real-world timelines, establishes the planning or implementation roles for stakeholder organizations for each concept, and identifies potential funding sources, timing, and performance metrics, among other important components.

**MEASURABLE OUTCOMES** assigns research-supported, quantitative goals to track success of recommended concepts and initiatives.

**PRAGMATIC IMPLEMENTATION** is the realization of an inclusive and sustainable Tourism Master Plan process that can strengthen and prepare a destination for the future with stakeholder and community support built through a collective and positive process.
By teaming with:

- Global Sustainable Tourism Council - The Global Sustainable Tourism Council (GSTC) establishes and manages global sustainable standards, known as the GSTC Criteria. There are two sets: Destination Criteria for public policymakers and destination managers, and Industry Criteria for hotels and tour operators. These are the guiding principles and minimum requirements that any tourism business or destination should aspire to reach in order to protect and sustain the world's natural and cultural resources, while ensuring tourism meets its potential as a tool for conservation and poverty alleviation.

- Tourism Diversity Matters - Tourism Diversity Matters (TDM), founded as the collaborative leader of Diversity, Equity, and Inclusion (DEI) initiatives and concepts that can address the gaps of ethnic disparities and provide decision-makers in the tourism and events industry access, resources, and tactics to develop more effective Diversity & Inclusion strategies that will engage and retain a diverse workforce.

We know that it takes experience and expertise to deliver a comprehensive Tourism Master Plan for a destination like Palm Beach County, and we aren't afraid to bring in subject matter experts to deliver the detailed knowledge and insight necessary to round out the team.

THIRD IS OUR DEEP DESIRE TO WORK WITH AND HELP OUR CLIENTS DELIVER SUCCESSFUL STRATEGY AND IMPLEMENTATION PLANS FOR THEIR DESTINATION.

At the end of the day, our clients must be enthusiastic and prepared to embrace the Tourism Master Plan and direct/manage the implementation to make change happen. That's why we spend significant time and effort with the client's project team, the project's steering committee and a broad collection of officials, agencies and organizations that will be responsible for implementation. From start to finish, and beyond, CSL will work in concert with Palm Beach County, its project team and steering committee to:

- Engage the industry, officials, and community;
- Employ and deploy multiple research activities to guide the process;
- Develop consensus on the destination's vision, recommendations, strategies, and plans; and
- Build champions for the final product and use those voices and momentum to implement and affect change.

CSL will also stay around long after the Tourism Master Plan is delivered to assist with the rollout and implementation of the recommendations, strategies, activities, timing, budgeting, monitoring and measurement. These optional implementation activities are specified in optional Task 12 of the workplan.
3.3 PROJECT APPROACH INFORMATION

3.3.1 PROJECT TASKS

3.3.2 COLLABORATION WITH STAKEHOLDERS

3.3.3 EVENTS AND INTERVIEWS

3.3.4 STAKEHOLDER INPUT AND CONSENSUS

3.3.5 COUNTY RESOURCES REQUIRED
TASK 1. PROJECT KICK-OFF AND PLANNING

We will initiate the tourism planning process during a kick-off session with Palm Beach County management and staff. This will include initial on-site meetings to discuss project timing, data requests, stakeholder lists and other kick-off items. During our initial visit to the destination, we will conduct an in-person work session with the Palm Beach County project team to ensure that existing research, insight, and experience with respect to the tourism industry in the county is incorporated.

The visit will also itemize the assistance we expect from Palm Beach County including, but not limited to, collection and provision of documents; logistics and invitations to stakeholders for interviews, focus groups, meetings, and presentations; organization and logistics for project steering committee meetings; and timely review and feedback of all interim and final work products. This effort is usually undertaken by a senior staff person at the DMO who has broad industry and destination experience and an excellent network of personal relationships throughout the destination. The time and effort commitment varies depending on the stage of the project, with significant time requirements upfront for logistics, during periods of work product review and feedback, and at the end project when documents are being finalized and socialized with the community. On average, Palm Beach County should expect this internal project manager to be engaged 50% on Tourism Master Plan efforts over the duration of the project.

We will also undertake important planning for stakeholder and community outreach, which is critical in identifying and engaging public sector, private sector and the community in the process and garner "buy-in" to the plan and eventual recommendations.

KEY ACTIVITIES

- Perform kick-off meeting and orientation between CSL and PBC team
- Discuss roles and responsibilities and project requirements
- Collect secondary research, including existing customer research from appropriate sources
- Collect county, city, and community research, reports, strategies etc. that might influence, feed into, or impact the Tourism Master Plan project
- Collect existing cultural tourism and diversity initiatives
- Facilitate detailed project planning between CSL and PBC team to coordinate project timing and rollout for work plan activities
- Perform engagement planning and stakeholder analysis (see below)
  - Identify the specific stakeholders to be engaged, including creative efforts to engage culturally diverse, underrepresented, and marginalized communities as well as cross sector civil society organizations including environmental, social, and community-led groups.
  - Build calendars for stakeholder engagement, community survey, visioning workshops, draft recommendations, and reports
  - Execute engagement invitations
- Determine the ratings and traffic threshold to be applied for in-person destination assessment
- Conduct familiarization tour of the destination and in-person review of selected venues
- Initiate discussions with PBC's communications and community engagement team to define work program for TMP project messages and vehicles for dissemination
- Schedule periodic meetings and briefings for PBC team and TMP Steering Committee.
DELIVERABLES

Project Management Plan: The first deliverable will summarize planning activities for Tourism Master Plan project. It will document the kick-off meeting, summarize roles and responsibilities for the CSL project team and the PBC client team. It will itemize secondary research that will be collected and provided to the project team. It will summarize the community research that will take place, as well as chart out the precise project planning with scheduled tasks and dates. The report will document the stakeholder engagement strategies that will be employed to engage diverse groups and cross-sector organizations. The report will document the destination assessment criteria, the list of venue assessment completed, and the collaboration on messaging. Regular meetings will be agreed and scheduled. Overall, the report will present a comprehensive, inclusive, and well-coordinated strategy for an effective undertaking of the Tourism Master Plan project.

STAKEHOLDER PLANNING

The stakeholder outreach process draws from the leadership and insight of a broad base of key constituent organizations for the purposes of identifying, analyzing, and prioritizing the most important issues facing Palm Beach County as a destination for visitors and residents. We suggest that the list of individuals and organizations include the following:

PUBLIC SECTOR OFFICES AND AGENCIES (COUNTY):

- **Palm Beach County Tourism Development Council (TDC):** The primary entity responsible for tourism development and promotion in the county.
- **Palm Beach County Planning and Zoning Department:** Responsible for land use planning and regulations that may impact tourism infrastructure and development.
- **Palm Beach County Economic Development Office:** Responsible for fostering economic growth, which includes promoting and supporting the tourism industry.
- **Palm Beach County Parks and Recreation Department:** Manages public parks, facilities, and recreational spaces, which are often significant attractions for tourists.
- **Palm Beach County Transportation Department:** Involved in developing transportation infrastructure to facilitate easy access for tourists to various attractions.
- **Palm Beach County Environmental Resources Management Department:** Responsible for preserving and managing natural resources, which can be a key component of tourism.
- **Palm Beach County Cultural Council:** Responsible for supporting and promoting cultural activities and events that can contribute to the tourism experience.
- **Palm Beach County Chamber of Commerce:** Represents the business community, including hospitality and tourism-related businesses.
- **Palm Beach County Convention and Visitors Bureau:** Focuses on marketing and promoting the county as a tourist destination.
- **Palm Beach County Historic Preservation Board:** Involved in preserving and promoting historic sites and landmarks that can attract tourists.
- **Palm Beach County Public Relations Office:** Responsible for managing communication and public relations efforts related to the tourism industry.
- **Palm Beach County Health Department:** Ensures health and safety standards are met in tourism-related establishments.
- **Palm Beach County Emergency Management Agency:** Involved in planning for and responding to emergencies that might affect tourism.
- **Palm Beach County Environmental Health Department:** Ensures sanitation and health standards are met in hotels, restaurants, and other tourism-related facilities.
- **Palm Beach County Small Business Development Center:** Supports small businesses within the tourism sector.
- **Palm Beach County Housing and Community Development Department:** Can be involved in initiatives related to affordable accommodations for tourists.
- **Palm Beach County Water Utilities Department:** Ensures reliable water and utility services for tourism-related facilities.
- **Palm Beach County Department of Cultural Affairs:** Supports cultural and artistic events that can attract tourists.
- **Palm Beach County Sheriff's Office:** Responsible for maintaining safety and security in tourist areas.
COUNTY MUNICIPALITIES:

Please note, although this project is focused on the broader Palm Beach County, many of the ultimate recommendations will reside in one or more of the 39 Palm Beach County municipalities. As such, it will be particularly important to engage each of the communities in the project and process.

- WEST PALM BEACH: The county seat and a major city, it hosts cultural events, attractions, and plays a central role in the county’s tourism.
- BOCA RATON: Known for its upscale amenities, cultural institutions, and beautiful beaches, it’s a significant tourist destination.
- DELRAY BEACH: Famous for its vibrant arts scene, historic downtown, and events, Delray Beach attracts many tourists.
- PALM BEACH: A renowned luxury destination with upscale shopping, high-end resorts, and beautiful oceanfront views.
- JUPITER: Offers a mix of natural beauty, outdoor activities, and waterfront attractions.
- LAKE WORTH BEACH: Known for its artistic community, historic downtown, and beachfront events.
- BOYNTON BEACH: Offers diverse recreational opportunities, shopping districts, and cultural experiences.
- WELLINGTON: Recognized for its equestrian events and facilities, it draws visitors interested in horse-related activities.
- PALM BEACH GARDENS: Home to upscale shopping, golf courses, and cultural attractions, it’s a draw for both residents and tourists.
- ROYAL PALM BEACH: Known for its family-friendly environment and community events.
- NORTH PALM BEACH: Offers boating, golfing, and waterfront attractions.
- RIVIERA BEACH: Features attractions like the marina and Singer Island beaches.
- GREENACRES: Known for its parks, recreational facilities, and family-oriented events.
- LANTANA: Offers coastal attractions, events, and a laid-back atmosphere.
- PALM SPRINGS: Known for its parks, recreation, and community events.
- TEQUESTA: Offers a peaceful environment and access to the Loxahatchee River.
- JUNO BEACH: Known for its pristine beaches and conservation efforts.
- HYPOLUUX: Offers waterfront attractions and access to the Intracoastal Waterway.
- LAKE PARK: Features parks, events, and access to the Lake Worth Lagoon.
- SOUTH PALM BEACH: Offers a quieter beach experience and oceanfront attractions.
- MANGONIA PARK: Known for its natural beauty and recreational facilities.
- PALM BEACH SHORES: Offers small-town charm and oceanfront attractions.
- CLOUD LAKE: Known for its upscale residential areas and coastal attractions.
- BOINY BREEZES: Known for its unique mobile home community and proximity to the ocean.
- OCEAN RIDGE: Offers coastal attractions and a relaxed atmosphere.
- HAVENHILL: Known for its community parks and green spaces.
- ATLANTIS: Offers a peaceful environment and golf course attractions.
- MANALAPAN: Known for its luxury estates and oceanfront views.
- PAHOKEE: Offers access to Lake Okeechobee and outdoor recreational opportunities.
- BELLE GLADE: Known for its agricultural heritage and access to Lake Okeechobee.
- SOUTH BAY: Offers a small-town feel and access to outdoor activities.
COMMUNITY ORGANIZATIONS:
- Palm Beach County Cultural Council
- Palm Beach County Hotel and Lodging Association
- Palm Beach County Restaurant Association
- Palm Beach County Chamber of Commerce
- Historical Society of Palm Beach County
- Palm Beach County Environmental Alliance
- Palm Beach County Arts Alliance
- Palm Beach County Sports Commission
- Palm Beach County Nonprofit Association
- Palm Beach County LGBTQ+ Organizations
- Palm Beach County Seniors’ Associations
- Palm Beach County Youth Organizations
- Palm Beach County Agricultural and Farmers’ Associations
- Palm Beach County Nature Conservancy Groups
- Palm Beach County Community Arts Organizations
- Palm Beach County Neighborhood Associations
- Palm Beach County Minority Business Associations
- Palm Beach County Historical Preservation Societies
- Palm Beach County Women’s Organizations
- Palm Beach County Volunteer Associations
- Palm Beach County Environmental Education Organizations
- Palm Beach County Civic Associations
- Palm Beach County Wellness and Health Organizations
- Palm Beach County Arts and Crafts Guilds

INDUSTRY STAKEHOLDERS
- Hotel/resort owners, managers, and operators
- Vineyard and winery owners, managers, and operators
- Restaurant and retail sector leadership
- Outdoor, art/culture, performing arts, family, and other attraction representatives
- Meetings, sports, music, and other public assembly facility representatives
- Transportation / mobility officials, agencies, owners /operators
- Organizers and producers of major Palm Beach County events
- Private developers

DELIBERABLES
- Stakeholder Engagement Plan: This deliverable will document that list of Stakeholders that will be engaged by the project team and client team in the Stakeholder Engagement (Task 4) and the methods by which each group will be engaged, such as 1-on-1 interviews, small group sessions, focus group sessions, public / town hall meetings, online surveys, etc.
TASK 2. INITIAL STEERING COMMITTEE WORKSHOP

To help launch the project, CSL will host and facilitate a Steering Committee Workshop with its Subject Matter Experts to align on project goals, priorities, and focus.

This workshop serves to introduce the CSL project team and subject matter experts to the Steering Committee, provide an overview of the project activities and timing, and articulate expectations for Steering Committee engagement. It will also be used to engage the Steering Committee to articulate their goals, priorities, and focus.

KEY ACTIVITIES

- Meet and brief the TMP Steering Committee on Project Management Plan
- Introduce Subject Matter Experts and agree the depth of subject matter research
- Conduct TMP goals definition and priorities exercises

DELIVERABLES

- Report on TMP Goals, Priorities and Focus: This deliverable will document the goals, priorities and focus of the TMP Steering Committee and be used by the project team to prepare research materials, create visitor and resident survey questions, outline stakeholder engagement questions, as well as prioritize TMP recommendations and strategies.

Please note, we anticipate asking the Steering Committee to meet for a couple hours about once a month for the duration of the project. In addition, we will work with the PBC project manager to distribute and collect feedback from the Steering Committee on interim work products, final reports, etc.
TASK 3. LEVERAGING IMPORTANT PLANS & RESEARCH

A THOROUGH REVIEW AND INCORPORATION OF PRIMARY AND SECONDARY RESEARCH, STRATEGIES, AND PLANS

Numerous economic and other development plans have been prepared that target growth for Palm Beach County. We will review these documents and develop a coherent message as to how the Tourism Master Plan interacts, supports, and benefits from existing strategic planning. In fact, the tourism sector interacts heavily throughout the local and regional economy in terms of supporting quality of life and business/resident attraction, providing jobs for a wide income spectrum, and supporting large and small businesses.

We will thoroughly review existing research, data, strategic plans, studies, and other documents that are relevant to preparing the Tourism Master Plan. These include the following.

- Information to be received from Palm Beach County, including existing and planned hotel inventory, lodging performance data, event space inventory, and convention and sports event contact directories.
- County and City Government Reports: Comprehensive Plans, Resident Surveys, Strategic Plans, Parks and Recreation Plans, Natural Resource Management Plans, etc.
- Event, attendee, occupancy, financial performance and related information for existing area attractions and venues (sports, convention, music, etc.) that impact the visitor industry.
- Current and planned economic development projects (business, residential, retail, etc.), including public/private partnerships, that can help create a density and energy that is beneficial for enhancing visitor experiences and creating a higher quality of life for residents.
- Performance data for the various special events held throughout the year, particularly those that currently or could potentially be leveraged towards attracting visitors.
- Current area transportation data and conditions (air access, freeway access, transit assets, first/last mile transportation), with a focus on assessing the impacts of any planned future projects on both the visitor appeal of the destination and the local population.
- Other regional infrastructure in place to support the visitor industry.
- Public sector policies and procedures, considering their effectiveness (or lack thereof) in supporting the visitor industry and resident quality of life.

This review will ensure that highly valuable and relevant insight that has already been developed is leveraged into the Tourism Master Plan.

KEY ACTIVITIES

- Review and analyze all relevant current travel and tourism studies and plans
- Review and analyze market and visitor data, studies, reports, and existing consumer research
- Collect and analyze reporting of global, national, and statewide consumer and travel and tourism research and trends
- Review and analyze all county, city, community and neighborhood research, reports, strategies plans, crisis management plans, workforce development plans, etc.
- Review cultural and inclusion initiatives to identify opportunities for cultural tourism development and improving diversity, equity, inclusion, and accessibility.
- Conduct Sustainability Assessment of the above across economic, environmental, social, cultural impact areas to identify key challenges, performance to date, gaps, and opportunities for potential future action to improve sustainability including climate change resilience and equity.
DELIVERABLES

- Destination Research Report: This deliverable will collate, review, and analyze Palm Beach County's consumer, visitor, economic, market and all other types of destination research, and produce a series of conclusions from the research that should be considered for action by the Tourism Master Plan.

TOURISM ASSET REVIEW

During our extensive in-market work within Palm Beach County, we will conduct an in-person area-by-area analysis focusing on the visitor appeal and resident quality of life of specific tourism products, amenities, attractions, and communities within the destination. This review will help to identify gaps or challenges and begin the process of developing initiatives to address them.

During our tourism asset review, we will visit/assess Palm Spring County's major tourism infrastructure, venues and facilities including, but not limited to:

1. BEACHES:
   - Notable beaches include Palm Beach, Delray Beach, Juno Beach, and Jupiter Beach.

2. CULTURAL ATTRACTIONS:
   - Kravis Center for the Performing Arts: Showcases live theater, music, and dance performances.

3. ECOTOURISM AND NATURE:
   - Lion Country Safari: Offers a drive-through safari experience with exotic animals.
   - Grassy Waters Preserve: A wetlands ecosystem for guided hikes, birding, and nature education.
   - McCarthy’s Wildlife Sanctuary offers educational tours featuring rescued animals.

4. ENTERTAINMENT COMPLEXES:
   - CityPlace: A shopping, dining, and entertainment district in West Palm Beach.
   - Downtown at the Gardens: Features shops, dining, and a variety of entertainment options.

5. EQUESTRIAN VENUES:
   - International Polo Club Palm Beach: Hosts high-goal polo matches and events.
   - Palm Beach International Equestrian Center: Venue for show jumping and dressage competitions.

6. FAMILY-FRIENDLY ATTRACTIONS:
   - South Florida Science Center and Aquarium offers interactive exhibits for all ages.
   - Rapids Water Park is a family-friendly water park with slides and attractions.

7. GOLF COURSES AND COUNTRY CLUBS:
   - Numerous championship golf courses, many designed by world-renowned golf architects.
   - Prominent clubs include PGA National Golf Club and Trump International Golf Club.

8. LOCAL FOOD AND FARMERS’ MARKETS:
   - GreenMarket at the Palm Beaches: Offers fresh produce, artisanal products, and live entertainment.

9. LUXURY SHOPPING:
   - Worth Avenue: An iconic shopping district in Palm Beach with upscale boutiques, galleries, and dining.
   - The Gardens Mall: A premier shopping destination with high-end retailers and dining options.

10. MARINAS AND WATERFRONT FACILITIES:
    - Harbourside Place: A waterfront complex in Jupiter featuring shops, dining, and entertainment.

11. MUSEUMS AND HISTORICAL SITES:
    - Henry Morrison Flagler Museum: Offers a glimpse into the Gilded Age through a historic mansion.
    - Jupiter Inlet Lighthouse and Museum: Provides insights into local maritime history.
    - Whitehall, the Henry Morrison Flagler Museum, offers a glimpse into the Gilded Age.
12. NATURE AND WILDLIFE CENTERS:
   - Loggerhead Marinelife Center: A rehabilitation and education center focused on sea turtles.
   - McCarthy's Wildlife Sanctuary: Offers educational tours with rescued animals

13. NIGHTLIFE AND ENTERTAINMENT:
   - Clematis Street in West Palm Beach is known for its vibrant nightlife, live music, and dining.

14. PALM BEACH INTERNATIONAL AIRPORT (PBI):
   - The primary airport serving the county, connecting travelers to various domestic and international destinations.

15. PALM BEACH COUNTY CONVENTION CENTER:
   - A modern venue for conferences, trade shows, and large-scale events, located in West Palm Beach.

16. PARKS AND OUTDOOR RECREATION:
   - Jonathan Dickinson State Park: Offers hiking, camping, kayaking, and wildlife viewing.
   - Grassy Waters Preserve: A wetlands ecosystem with guided hikes and birdwatching.
   - Okeeheelee Park: Offers sports fields, nature trails, and water sports on lakes.
   - John Prince Park: Features picnic areas, playgrounds, and water activities.
   - John D. MacArthur Beach State Park: Features natural trails, a pristine beach, and snorkeling.
   - Intracoastal Waterway: Provides opportunities for boating and sightseeing along the scenic waterway.

17. SPORTING FACILITIES:
   - Roger Dean Chevrolet Stadium: Spring training home to the Miami Marlins and St. Louis Cardinals.
   - FITTEAM Ballpark of the Palm Beaches: Spring training venue for the Washington Nationals and Houston Astros.

18. RESORTS AND HOTELS:
   - Notable resorts include The Breakers Palm Beach and PGA National Resort & Spa.

TOURISM EVENTS AND FESTIVALS REVIEW

We will also review and assess the most important events and festivals that take place in Palm Beach County, including but not limited to:

1. SUNFEST: A multi-day music and arts festival featuring live music performances, art exhibits, and a diverse range of food vendors. It's one of Florida's largest waterfront music and art festivals.

2. PALM BEACH INTERNATIONAL BOAT SHOW: An annual event that showcases a wide range of boats and marine accessories, drawing boating enthusiasts and professionals from around the world.

3. SOUTH FLORIDA FAIR: An iconic event featuring agricultural exhibits, carnival rides, live entertainment, and a variety of food offerings. It's a celebration of local culture and traditions.

4. ARTPALMBEACH: An art fair that brings together galleries, artists, and collectors, showcasing contemporary art, photography, and design.

5. PALM BEACH FOOD AND WINE FESTIVAL: A culinary event featuring top chefs, wine tastings, cooking demonstrations, and gourmet experiences.

6. DELRAY AFFAIR: One of the largest outdoor arts and crafts festivals in the Southeast, featuring artwork, crafts, live music, and local cuisine in downtown Delray Beach.

7. PALM BEACH JEWELRY, ART & ANTIQUE SHOW: Showcasing a stunning collection of jewelry, antiques, and fine art from around the world, this event attracts collectors and enthusiasts.

8. FLORIDA RENAISSANCE FESTIVAL: A medieval-themed event offering jousting tournaments, stage performances, artisan crafts, and immersive entertainment.

9. WELLINGTON WINTER EQUESTRIAN FESTIVAL: An internationally recognized equestrian event showcasing show jumping and dressage competitions, attracting riders and spectators.

10. JUPITER SEAFOOD FESTIVAL: Celebrating the area's maritime heritage, this festival features fresh seafood, live music, arts and crafts, and family-friendly activities.
11. **BOCA RATON SEAFOOD AND MUSIC FESTIVAL**: A waterfront festival featuring seafood dishes from local restaurants, live music, and a vibrant atmosphere.

12. **SUNFEST BATTLE OF THE BANDS**: A platform for local bands to showcase their talent, with the winner earning a spot to perform at SunFest.

13. **POLO MATCHES IN WELLINGTON**: The Winter Equestrian Festival includes high-goal polo matches that attract equestrian enthusiasts and socialites.

14. **JUPITER JUBILEE**: A community event celebrating the town's history with live entertainment, food vendors, and activities for all ages.

15. **CLEMATIS BY NIGHT**: A free weekly concert series in downtown West Palm Beach, featuring live music, food vendors, and a lively atmosphere.

16. **SCREEN ON THE GREEN**: A series of outdoor movie nights in West Palm Beach's Waterfront Park, providing a family-friendly entertainment option.

17. **PALM BEACH SHAKESPEARE FESTIVAL**: An annual event featuring outdoor Shakespeare performances in a picturesque setting.

18. **EASTER PARADE AND EGG HUNT**: A family-friendly Easter celebration featuring a parade, egg hunts, and festive activities.

19. **PALM BEACH PRIDE**: A LGBTQ+ pride festival celebrating diversity and inclusion, featuring live entertainment, vendor booths, and a parade.

20. **WEST PALM BEACH GREENMARKET**: A weekly farmer's market offering fresh produce, artisanal products, and live entertainment.

We stress an on-the-ground approach, and our destination experts will spend extensive time in-market conducting this research.

**KEY ACTIVITIES**

- Work with PBC and research providers to conduct a destination-wide assessment of tourism-related assets, establishments, activities, experiences, events, and festivals.

**DELIVERABLES**

- **Destination Asset and Experience Report**: This deliverable will document the strengths and weaknesses (specific and general) associated with Palm Beach County's tourism assets and experiences (events and festivals). From this analysis, the report will produce a series of conclusions from the effort that should be considered for action by the Tourism Master Plan.
We will undertake a phase of important stakeholder and community outreach to collect and gauge the issues and opportunities regarding Palm Beach County tourism that should be incorporated in the Tourism Master Plan from both an industry and resident perspective.

Stakeholder involvement (public sector, private sector, and industry) in the tourism planning process will help to assess and evaluate the destination’s current market position, asset base and current / future target markets. It will also serve as the basis for a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis of the destination, and help build stakeholder “buy-in” to the process and eventual Plan recommendations.

The Stakeholder engagement will consist of one-on-one interviews with VIPs, focus group sessions with collective interest groups, public forums with community / neighborhood groups and more depending on the list of stakeholders developed with PBC during the Kickoff planning session.

To ensure that useful insight and information is developed during this Task, we will undertake the following steps to provide for a well-organized and productive stakeholder facilitation process.

- Fully develop the initial list of individuals and organizations that should be included in the process. This will be refined and expanded as the research continues.
- Define the types of forums to be used to solicit feedback and to coherently organize perspectives, opinions, and recommendations. These forums can include individual interviews, focus groups, online surveys (for broader audiences), and various other planning sessions designed to bring together community stakeholders.
- Develop presentation materials to facilitate discussion amongst stakeholder participants.
- Develop a schedule for conducting stakeholder outreach.

KEY ACTIVITIES

- Review and agree outline and questions for stakeholder engagement
- Conduct a series of interviews and meetings with the destination’s key stakeholders (tourism industry, government, and community stakeholders) to vision a forward-looking destination. Efforts will be undertaken to engage culturally diverse, underrepresented, and marginalized communities as well as cross sector civil society organizations including environmental, social, and community-led groups.
- Identify participant opinions, values, aspirations, priorities, and ideas for the future of the destination and tourism marketing in the destination and each of the major communities and neighborhoods
- Build an informal group of “champions” for the project who will be critical to the endorsement and implementation of the Tourism Master Plan upon completion

DELIVERABLES

- Stakeholder Engagement and SWOT Analysis: This deliverable will document and summarize the conversations and learnings from the Stakeholder Engagement process. This information will then be presented as a SWOT Analysis illustrating the Strengths, Weaknesses, Opportunities and Threats that should be considered for action by the Tourism Master Plan.
If needed and/or necessary, to complement the in-person Stakeholder engagement, CSL will conduct:

- In-depth surveys of the frontline workers in Palm Beach County tourism industry, including hotel and restaurant staff/concierges, tour operators, outfitters and others that directly interact with visitors.

- Surveys of leading travel and tourism representatives concerning their perceptions of Palm Beach County tourism industry product. Surveys can be sent to over 500 members of the Society of American Travel Writers. This type of research can give a useful, unbiased view as to opinions of current conditions, perceived threats to future success, and suggestions for future target markets.

- Lodging property survey to assess market mix, desired room night balance (events/other leisure), top feeder markets and future performance projections.

- Surveys of sports, convention, meeting, and other planners that have held or considered holding events in Palm Beach County, and of those who have considered the market but went elsewhere with their event(s).

TAPPING INTO THE VIEWS AND OPINIONS OF AREA RESIDENTS.

To round out our Stakeholder Engagement activity, we will develop and conduct an extensive survey of the County’s resident base regarding their views of tourism, its importance to the overall economy, and how their quality of life is impacted by Palm Beach County tourism, tourism assets and experiences. This information, coupled with the 2022 Destination Analysts San Diego Visitor Profile Study will provide insight and suggestions as to potential improvement of the tourism-related product in Palm Beach County and its opportunity for enhancing the visitor experience as well as resident quality of life.

Our research effort will carefully consider and incorporate these visitor and resident findings into the Tourism Master Plan, helping to ensure the relevancy, impact, and effectiveness of the final recommendations.

DELIVERABLES

- Resident Engagement Report: This deliverable will document resident sentiment associated with the tourism industry in Palm Beach County, including but not limited to its economic impact, overtourism, sustainability, DEI, and many other topics. It will also document and analyze their perspectives and opinions of specific and general tourism assets, experiences, and their ideas for enhancement and improvement among many other topics. From this analysis, the report will produce a series of conclusions that should be considered for action by the Tourism Master Plan.
TASK 5. DESTINATION BENCHMARKING

COMPARISON AND GAP ANALYSIS WITH RESPECT TO BENCHMARK DESTINATIONS

We will prepare a benchmarking analysis of Palm Beach County and peer / aspirational destinations, visitor infrastructure, visitation / performance levels, traveler reviews, financial resources, and planning strategies. We believe it is vital to learn from comparable destinations that have garnered reputations as vibrant places to visit, work, and live, and as a result have attracted millions of visitors and residents in recent years.

KEY ACTIVITIES

- Identify direct competitive set and aspirational cities / destinations for destination benchmarking analysis
- Review and assess budgets for selected destination marketing organizations.
- Collect and analyze new and creative use of sports, convention, conference, entertainment, festival, cultural, historic, natural, and other tourism assets to help drive optimal visitation to the destination; attendance mix (residents/visitors); financial performance, seasonality, and related information.
- Compile trending initiatives that have led to sustainable increases in destination visitation and enhanced quality of life for residents.
- Identify creative development and investment initiatives designed to build assets that can deliver positive benefits to Palm Spring County’s economy, environment, and communities.
- Align benchmarked product portfolios with existing and planned Palm Beach County product to understand gaps and opportunities to differentiate the destination.
- Review of demographics, population shifts and trends to place market niches and opportunities in context (ex: sports, arts, outdoor recreation, cultural diversity, communities, local enterprises, connecting visitors to stewardship and restoration opportunities, etc.)

Some of the key direct competitors to Palm Beach County include (see 3.2.3b above):

- Miami, Florida
- Orlando, Florida
- Fort Lauderdale, Florida
- Key West, Florida
- Naples, Florida
- Sarasota, Florida
- Hilton Head Island, South Carolina
- Charleston, South Carolina
- San Diego, California
- Myrtle Beach, South Carolina
- Newport Beach, California
- Virginia Beach, Virginia

Some of the aspirational cities for San Diego to consider include (see 3.2.3b above):

- Aspen, Colorado
- Monterey, California
- Maui, Hawaii
- Santorini, Greece
- Barcelona, Spain
- Bali, Indonesia
- Dubai, United Arab Emirates
- Cannes, France
- Maldives
- Queenstown, New Zealand
- Amalfi Coast, Italy
- Kyoto, Japan

DELIVERABLES

- Destination Benchmarking Report: The Destination Benchmarking data will be summarized into a concise benchmarking assessment of key visitor industry product, facility, placemaking and other strategic initiatives. The analysis will yield a useful comparison of Palm Beach County to peer and aspirational destinations and will help to identify effective initiatives that should be considered by stakeholders and the community to help increase tourism industry market share. From this analysis, the report will produce a series of conclusions that should be considered for action by the Tourism Master Plan.
TASK 6. DESTINATION BRANDING, MARKETING & MESSAGING ASSESSMENT

With the research and stakeholder engagement in hand, CSL will use these findings along with its extensive destination strategy and marketing experience to review Palm Beach County's marketing vision, strategy, and plans, and provide recommendations to enhance the same.

The review will include a comprehensive assessment of how the brand is brought to life through communications, advertising, and engagement strategies.

KEY AREAS OF FOCUS

- **HISTORY AND BACKGROUND**: The organization's roots and the regional partners who contribute to promoting the riches of the area.
- **BRAND STORY**: The driving force of what makes the brand unique, stand out, and the framework for how it sounds and is positioned in the market.
- **MARKETING VISION**: The direction of the marketing programs with the vision of the organization and the strategies and tactics to unify the plan.
- **SUSTAINABILITY AND DEI**: The risks and opportunities of the Palm Beach County brand and marketing strategies related to destination stewardship principles including improving climate resiliency and equity, diversity, inclusion, and accessibility.
- **INDUSTRY CONTEXT**: The bigger picture of travel, technology, and the factors that make people think – or think twice – about taking a trip to Palm Beach County.
- **MARKETING PERFORMANCE AND INSIGHTS**: The numbers for Palm Beach County and its performance in the ever-changing landscape of marketing.
- **TARGET AUDIENCE**: Descriptions and details of the traveler segments and personas who are most apt to love the area as much as the locals do as well as support community priorities and destination stewardship goals.
- **REACHING EACH AUDIENCE**: Details on how, where, why, and what the target markets care about when it comes to Palm Beach County.
- **MARKETING CHANNEL STRATEGIES**: Diving into each channel on what's been working and plans to reach new eyeballs.
- **CAMPAIGN THOUGHT STARTERS AND CO-MARKETING CONCEPTS**: Themes used to reach the targets in ways that matter to them and how partnerships can amplify brand affinity.
- **RESIDENT ENGAGEMENT**: Efforts by Palm Beach County to engage residents in local activities / events and become champions for the region.
- **MARKETING MATERIALS, PLANS, AND ROLLOUT**: The key assets used to tell others all about Palm Beach County, when to deploy them, and how to grow optimally year over year based on metrics and successes.

DELIVERABLES

- **Destination Branding, Marketing and Messaging Assessment**: Please note this marketing review and recommendation task is not intended to deliver an updated marketing strategy, rather a review and analysis of the existing marketing strategy and how future marketing efforts might fit into the Tourism Master Plan recommendations. From this analysis, the report will produce a series of conclusions that should be considered for action by the Tourism Master Plan.
**TASK 7. DESTINATION ASSESSMENT – DIVERSITY, EQUITY, AND INCLUSION (DEI)**

Incorporating diversity, equity, and inclusion (DEI) principles into the Tourism Master Plan involves evaluating all aspects of the project within the broader context of assessing a location’s suitability and potential for Diversity, Equity, and Inclusion.

As such, this task helps ensure that the development and promotion of Palm Beach County is done in a way that is fair, respectful, and welcoming to all individuals, regardless of their backgrounds. It also creates a positive and enriching experience for residents and visitors, fostering a more vibrant and sustainable destination.

Tourism Diversity Matters (TDM) considers multiple aspects and angles and helps the project create strategic action items for Measuring, Reporting, and Improving structural DEI actions. TDM will use tools to collect and report valuable information about Palm Beach County’s current strengths and opportunities for improvement. We pair that knowledge with processes that will help decide strategically where to focus limited resources, time, and energy to make the most significant sustainable progress toward goals.

The critical components of a DEI destination assessment generally include:

- **PHYSICAL AND GEOGRAPHIC FACTORS:** Examining the geographical location and environmental factors that might impact the destination’s appeal and development potential.

- **INFRASTRUCTURE AND ACCESSIBILITY:** Assessing the quality of transportation networks (roads, airports, ports, etc.) and other infrastructure contributing to the destination’s accessibility and convenience.

- **ECONOMIC AND BUSINESS ENVIRONMENT:** Analyzing the local economy, business environment, job market, industries, and potential for economic growth and diversification.

- **CULTURAL AND HISTORICAL ASSETS:** Identifying unique cultural heritage, historical landmarks, and local traditions that contribute to the destination’s identity and attractiveness.

- **TOURISM AND RECREATION:** Evaluating the existing tourism infrastructure, accommodation options, attractions, entertainment, and recreational opportunities that can draw visitors to the destination.

- **ENVIRONMENTAL SUSTAINABILITY:** Assessing the destination’s commitment to sustainable practices, conservation efforts, and responsible tourism to ensure long-term viability and minimize negative impacts.

- **COMMUNITY AND SOCIAL FACTORS:** Examining the local community’s attitudes, values, quality of life, and support for development initiatives.

- **LEGAL AND REGULATORY FRAMEWORK:** Understanding the legal and regulatory environment for businesses and investments in the destination, including zoning laws, permits, and potential barriers.

- **COMPETITIVE ANALYSIS:** Comparing the destination with similar or competing locations to identify its unique selling points and areas for improvement.

Because many of these activities are articulated in previous Tasks of the workplan, this Task is focused on coordination of that work with TDM and their focus on DEI.
KEY ACTIVITIES

The DEI destination assessment conducted by Tourism Diversity Matters will work closely with the CSL project team to coordinate the:

- Collection of research, materials, and reports (Task 1)
- Stakeholder planning (Task 1)
- Stakeholder workshop (Task 2)
- Review of destination documents (Task 3)
- Tourism asset review (Task 3)
- Event and festivals review (Task 3)
- Materials used in stakeholder engagement (Task 4)
- SWOT analysis (Task 4)
- Resident survey (Task 4)
- Destination benchmarking (Task 5)
- Destination marketing assessment (Task 6)
- Situational analysis (Task 8)
- Visioning workshops and draft recommendations (Task 9)

DELIVERABLES

- DEI Assessment: Based on the findings of the qualitative and quantitative DEI assessment documented in this report, TDM will deliver a series of conclusions that should be considered for action by the Tourism Master Plan.
This project for Palm Beach County is an important opportunity for public policymakers and destination managers to include effective and credible sustainable tourism policies in the Master Plan. In this Task, our partners from the Global Sustainable Tourism Council (GSTC) will ensure that sustainability in tourism and destination management is systematized, coherent, put into practice, measured, and monitored.

The GSTC Destination Assessment is designed to introduce the destination management team to the core elements required to develop sustainable policies and practices by applying the GSTC Criteria to the specific destination. This task allows Palm Beach County stakeholders to participate directly in GSTC application of the Criteria to the destination, to understand the destination’s sustainability status against the world’s leading standard, and to identify areas for improvement based on the GSTC Criteria.

The Assessment is led by a GSTC expert with global experience in the practical evaluation of sustainability and best practices globally, and a thorough understanding of the GSTC Destination Criteria.

The GSTC Destination Criteria (GSTC-D) have been built on decades of prior work and experience around the world, and they take into account the numerous guidelines and standards for sustainable tourism from every continent. During the process of development, they were widely consulted throughout the globe, in both developed and developing countries, in several languages. They reflect certification standards, indicators, criteria, and best practices from different cultural and geo-political contexts around the world in tourism and other sectors where applicable. Potential indicators were screened for relevance and practicality, as well as their applicability to a broad range of destination types. They were field-tested around the world. The process of developing the Criteria was designed to adhere to ISO codes of conduct and the standards-setting code of the ISEAL Alliance, the international body providing guidance for the development and management of sustainability standards for all sectors.

Some of the expected uses of the criteria by tourism management organizations include the following:
- Serve as basic guidelines for destinations that wish to become more sustainable
- Help consumers identify sound sustainable tourism destinations
- Serve as a common denominator for information media to recognize destinations and inform the public regarding their sustainability
- Help certification and other voluntary destination level programs ensure that their standards meet a broadly accepted baseline
- Offer governmental, non-governmental, and private sector programs a starting point for developing sustainable tourism requirements
- Serve as basic guidelines for education and training bodies, such as hotel schools and universities

**KEY ACTIVITIES**
- Starting at 5 days of onsite engagement, liaison with stakeholders
- Guided overview of the destination’s major areas of best practices, current sustainability achievements and risks
- Guided overview of select documented plans and policies coverage of GSTC Destination Criteria
- Preliminary results presentation by GSTC expert
- Concise Report outlining recommendations for overall sustainability improvement
- Summaries of the Report, which can be easily communicated to stakeholders, decision makers, community members, and target markets
- Marketing benefits, including media pieces distributed to GSTC global network
Sustainability Assessment: The Sustainability Assessment will include a series of conclusions that should be considered for action by the Tourism Master Plan.

- Build capacity among destination stakeholders in the GSTC Destination Criteria and the principles of sustainable tourism and sustainable destination management
- Learn the destination’s current sustainability status according to the world’s leading destination sustainability standard — the GSTC Destination Criteria
- Understand which policies and practices are currently working well, to improve efficient resource use and effective policymaking
- Generate positive marketing storylines about the destination’s commitment to sustainability and its areas of good practice
- Gain practical tools to compare sustainability performance across the major areas of destination sustainability: destination management, local economic benefit, community and cultural well-being, and environmental resource protection
- Identify concrete actions necessary to comply with the GSTC Destination Criteria
- Improve destination governance, policymaking, stakeholder engagement, and performance in the areas of sustainability management, economic development, community and cultural well-being, and energy and environmental conservation
- Prioritize urgent, important, and achievable next steps to address the destination’s sustainability risks
- Develop a baseline for sustainability monitoring, to track progress over time along the GSTC Criteria, beginning with GSTC expert analysis

**TASK 9. SITUATIONAL ANALYSIS**

The research, findings and insights developed as part of the previous project tasks will help to create a platform for facilitating the visioning workshops with Palm Beach County stakeholders. This Task is simple and direct, to summarize learnings to date and create a comprehensive and universal understanding of where Palm Beach County stands as a destination for visitors and residents today.

**KEY ACTIVITIES**

Prepare Situational Analysis Report and presentation deck, which includes the following:

- Review of Project Initiative, Goals, Priorities and Focus
- Destination and Tourism Asset Research
- Stakeholder and Resident Engagement and SWOT Analysis
- Destination Benchmarking
- Destination Branding, Marketing and Messaging Assessment

**DELIVERABLES**

- Situational Analysis Report and Visioning Workshop Presentation: This report will summarize the research and analysis produced by Tasks 1-8 and present a summarization of the conclusions that should be considered for action by the Tourism Master Plan. This material will be used to prepare Visioning Workshop participants for Task 10.
ARTICULATING AN UPDATED VISION FOR PALM BEACH COUNTY AS A DESTINATION

We find that the visioning workshops are an ideal method to introduce creativity, collaboration, and important local insight into the process of developing Tourism Master Plan recommendations with respect to target markets, tourism industry product gaps and new product initiatives.

The visioning workshop process begins with creating a common understanding of where our destination is at today, what our competition is doing, and how future trends will impact tourism growth in Palm Beach County market. We will start the sessions with an overview of our research findings to date, followed by a structured yet free flowing discussion of the future visitors, vision, opportunities, and priorities.

Our project team will lead the stakeholders through a process of focused creativity, targeting a variety of specific initiatives based on the planning process learnings to date. For each initiative, the sessions will generate a vision for engaging both new and traditional visitors, aligned with strategies and tactics to grow, empower, and diversify the County’s tourism industry.

As part of the stakeholder workshops, we will work with participants to align the various visions, strategies, and tactics into an initial, coordinated plan outline for the updated Tourism Master Plan. This will not represent a final product, but rather the initial stage of generating ideas for enhancing and expanding visitor-generating assets and experiences, growing existing tourism markets, and identifying new/emerging markets that should be targeted.

As we conduct the Visioning Workshops, we will stress:
- Ensuring a diversity of voices, from within, adjacent to and even outside the tourism sector.
- An openness to new ideas and a willingness to adapt and incorporate ideas into what we call initial Plan Pillars.
- The ability to envision how these Plan Pillars will eventually be assembled to support a tailored, future focused, actionable collective vision encompassed in the Tourism Master Plan.

We continually find that the blending of important research and analysis, our extensive past tourism planning experience, and extensive local stakeholder insight and creativity provides for consensus-driven, insightful, and actionable Plan initiatives. Rather than a Plan that “sits on a shelf”, the Visioning Workshops help lead to an excitement to execute within the community.

KEY ACTIVITIES

Host and facilitate visioning workshops with destination stakeholders to:
- Obtain a common understanding of where the destination is today
- Place Palm Beach County within its competitive and aspirational set
- Identify and assess how future trends will impact the destination
- Discuss future issues, opportunities, and priorities
- Define visitors of the future
- Update the Vision Statement
- Select and prioritize TMP issues and opportunities

Draft TMP Recommendations
- Draft initial TMP recommendations
- Present to the Steering Committee for feedback, selection, and prioritization

DELIVERABLES

- Visioning Workshop Report This deliverable will document the results from the Visioning workshop including but not limited to Vision Statement, definition of Visitors of the Future (FIT, Group, MICE, etc.), and priority list of conclusions from the research that should be addressed by the Tourism Master Plan.
- TMP Draft Recommendations: This deliverable, based on research to date, will present a series of recommendations for the Tourism Master Plan that are presented to the PBC Project Team and Steering Committee for review and feedback.
TASK 11. TOURISM MASTER PLAN

Using the information generated from the previous research tasks and the Visioning Workshops, we will work with the Palm Beach County project team and Steering Committee to develop initial and final Tourism Master Plan documents incorporating the following elements:

1. A near and long-term "Vision for Palm Beach County Tourism"
2. A clear description of recommended Tourism Master Plan initiatives (county-wide and municipality-specific)
3. Detailed plans for implementation
   a. A listing of key organizations and individuals that should be involved in the implementation process for each initiative, and their respective roles and responsibilities for implementation
   b. A timeline for implementing each initiative, including near-term initiatives that can be pursued immediately, mid-term initiatives to target over a two-to-five-year period, and longer-term initiatives that may take several years of planning and development.
   c. Defining key performance metrics and measurement benchmarks for each initiative.
   d. Organizing and putting in place the operational resource(s) (committee, working group, personnel) to birddog the plan and translate the vision into action.

Ultimately, the Tourism Master Plan will inform and guide Palm Beach County in identifying community needs and opportunities, setting a vision and roadmap for visitor-based economic growth and development that will also contribute to a healthy community for residents.

KEY ACTIVITIES

Draft Tourism Master Plan
- Articulate a 20-Year Vision for the City of Palm Beach County tourism.
- Present and prioritize a series of Tourism Master Plan Goals and Initiatives (county-wide and municipality-specific).
- Identify key organizations and individuals that should be involved in the implementation process for each initiative, and their roles and responsibilities
- Define the timeline for implementing each initiative, including near-term initiatives that can be pursued immediately, mid-term initiatives to target over a two-to-five-year period, and longer-term initiatives that may take several years of planning and development.

Present to PBC team and Steering Committee
- Collect and input feedback

Finalize Tourism Master Plan
- Provide graphic design of TMP according to PBC brand guidelines

Launch and present TMP to Industry Stakeholders, Government Leaders, and Community Groups
- Work with PBC to socialize TMP
- Conduct capacity-building session(s) with champions / key stakeholder groups around behavior change solutions to support future implementation.

DELIVERABLES

Tourism Master Plan (Full Report and Executive Summary)
- Project Goals and Overview
- Situational Analysis
- 20-Year Vision Statement
- Definition of Visitors of the Future
- Destination Pillars / Areas of Focus
- Recommendations
  - Goals
  - Define key performance metrics and measurement benchmarks for each initiative.
  - Create oversight committee to assess, direct, manage, and monitor TMP implementation

Strategies / Action Plans (county-wide and municipality-specific)
- Implementation Plan
  - Strategy Rollout and Timing
  - Roles & Responsibilities
  - Performance Metrics
  - Implementation Structure and Management
Beyond the comprehensive delivery of the Tourism Master Plan project, report, executive summary, and implementation plan envisioned by the RFP and articulated by this proposal, CSL would like to suggest an OPTIONAL second phase of the project, to assist Palm Beach County with implementation of the TMP. Optional services that CSL can deliver include:

- **IMPLEMENTATION WORKSHOPS AND TRAINING:** Offer workshops and training sessions for key stakeholders, local government officials, and tourism industry representatives. These sessions can help ensure that everyone involved understands the master plan's objectives, strategies, and their respective roles in implementation.

- **PROJECT MANAGEMENT SUPPORT:** Provide project management services to oversee the execution of various initiatives outlined in the master plan. This includes setting up timelines, tracking progress, identifying bottlenecks, and ensuring tasks are completed on schedule.

- **TASK FORCE CREATION:** Recommend the establishment of task forces or working groups dedicated to specific areas or projects outlined in the master plan. These groups can bring together experts, stakeholders, and community members to collaborate on implementation.

- **PUBLIC-PRIVATE PARTNERSHIPS:** Advise Palm Beach County to explore partnerships with private businesses and organizations that have a vested interest in tourism development. These partnerships can provide additional resources, expertise, and funding for implementation.

- **PERFORMANCE METRICS AND MONITORING:** Assist in measuring TMP performance indicators (KPIs) and setting up a monitoring system to track the success and impact of implemented strategies. Regular reporting and analysis of these metrics will help Palm Beach County gauge progress and make necessary adjustments.

- **STAKEHOLDER ENGAGEMENT CAMPAIGNS:** Recommend strategies to engage the local community, residents, and other stakeholders throughout the implementation process. This could include public awareness campaigns, community events, and feedback mechanisms to ensure inclusivity and transparency.

- **RESOURCE ALLOCATION AND BUDGETING:** Help Palm Beach County allocate resources and budget effectively to support the implementation efforts. This includes identifying funding sources, cost estimates for various initiatives, and prioritizing high-impact projects.

- **REGULATORY AND PERMITTING ASSISTANCE:** Provide guidance on navigating regulatory processes, obtaining necessary permits, and adhering to legal requirements for infrastructure and development projects.

- **SUSTAINABILITY INTEGRATION:** Suggest ways to integrate sustainable practices into the implementation process, such as eco-friendly infrastructure, waste management solutions, and responsible tourism guidelines.

- **FEEDBACK AND ADAPTATION MECHANISMS:** Recommend regular reviews and feedback loops to assess the effectiveness of implemented strategies. Use the insights gained to adjust and refine the approach over time.

- **CAPACITY BUILDING:** Provide training and capacity-building programs for local businesses, service providers, and entrepreneurs to align their offerings with the new tourism objectives.

- **CRISIS PREPAREDNESS AND MANAGEMENT:** Help Palm Beach County develop contingency plans and strategies for addressing unexpected challenges, such as natural disasters, pandemics, or economic downturns.

- **REGULAR PROGRESS REPORTING:** Suggest a structured reporting framework to keep all stakeholders informed about the progress of implementation. Regular updates can maintain momentum and transparency.

Each of these options will be tailored to the specific context, goals, and resources of Palm Beach County and the Tourism Master Plan. Details for assistance and associated fees/expenses will be determined and agreed upon toward the end of the Tourism Master Plan development according to PBC needs and budget.
3.3.6 PROJECT TIMELINE

Below is the sequencing of the major activities, milestones and deliverables proposed by CSL for this project. As with all strategic planning initiatives, we suggest that the timing be flexible to accommodate activity scheduling, logistics, review and feedback, and holidays. CSL will work with PBC and the Steering Committee to deliver the most appropriate timing for the project.

Please note that the sequencing of events envisions 33 weeks of work effort to research, prepare and deliver the Tourism Master Plan for Palm Beach County, assuming all tasks, meetings, feedback, and logistics happen according to plan.

However, it is our experience and recommendation that when more time is added to the project, the better, so we suggest that the Tourism Master Plan should target delivery in approximately one-year's time (kickoff to launch). Adding time into the schedule for review and consideration of interim work products, a thorough and deep engagement with stakeholders, and socialization of various elements to build support and champions for the effort.

In the City of Los Angeles, the Tourism Master Plan development and delivery took about one-year (kickoff to launch), which provided ample time for the project activities and socialization of the results. It is envisioned that the Palm Beach County Tourism Master Plan project would follow the same timing.

1. PROJECT KICK-OFF AND PROJECT PLANNING

<table>
<thead>
<tr>
<th>KEY ACTIVITIES</th>
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<tbody>
<tr>
<td>Perform kick-off meeting and orientation between CSL and PBC team</td>
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<td>Discuss roles and responsibilities and project requirements</td>
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<td>Collect secondary research, including seconding customer research from appropriate sources</td>
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<td>Collect county, city, community and neighborhood research, reports, strategies etc. that might influence, feed into, or impact the Tourism Master Plan project</td>
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<tr>
<td>Collect existing cultural tourism and diversity initiatives and master plans as noted in RFP</td>
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<tr>
<td>Facilitate detailed project planning between CSL and PBC team to coordinate project timing and roll out for work plan activities</td>
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<tr>
<td>Perform engagement planning and stakeholder analysis</td>
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<td>Determine the ratings and traffic threshold to be applied for in-person destination assessment</td>
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<tr>
<td>Conduct familiarization tour of destination and in-person review of selected venues</td>
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<tr>
<td>Initiate discussions with PBC’s Communications and Community Engagement consultant to define work program for TMP project messages and vehicles for dissemination</td>
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<tr>
<td>Schedule periodic meetings and briefings for PBC team and TMP Steering Committee</td>
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1. DELIVERABLES

- Project Management Plan

2. INITIAL STEERING COMMITTEE WORKSHOP

<table>
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<th>KEY ACTIVITIES</th>
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<tbody>
<tr>
<td>Meet and brief the TMP Steering Committee on Project Management Plan</td>
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<tr>
<td>Introduce Subject Matter Experts and agree the depth of subject matter research</td>
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<td>Conduct TMP goals definition and priorities exercises</td>
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2. DELIVERABLES

- Report on TMP Goals, Priorities and Focus

3. LEVERAGING IMPORTANT PLANS AND RESEARCH

<table>
<thead>
<tr>
<th>KEY ACTIVITIES</th>
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<tr>
<td>Review and analyze all relevant current travel and tourism studies and plans</td>
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<tr>
<td>Review and analyze market and visitor data, studies, reports, and existing consumer research</td>
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<tr>
<td>Collect and analyze reporting of global, national, and statewide consumer and travel and tourism research and trends</td>
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<tr>
<td>Review and analyze all county, city, community and neighborhood research, reports, strategies plans, crisis management plans, workforce development plans, etc.</td>
</tr>
<tr>
<td>Review cultural and inclusion initiatives to identify opportunities for cultural tourism development and improving diversity, equity, inclusion, and accessibility</td>
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3. DELIVERABLES

- Destination Research Report
### 1. Leveraging Important Plans and Research (continued)

**Tourism Asset Review**
- Work with PBC and research providers to conduct a destination-wide assessment of tourism-related establishments, activities, and experiences.

**Deliverables**
- Destination Asset Report

### 4. Stakeholder and Resident Engagement

**Key Activities**
- Review and agree outline and questions for stakeholder engagement, as well as general questions for community survey, etc.
- Conduct a series of interviews and meetings with the destination’s key stakeholders (tourism industry, government, and community stakeholders) to vision a forward-looking destination. Efforts will be undertaken to engage culturally diverse, underrepresented, and marginalized communities as well as cross-sector civil society organizations including environmental, social, and community-led groups.
- Identify participant opinions, values, aspirations, priorities, and ideas for the future of the destination and tourism marketing in the destination and each of the major communities and neighborhoods.
- Build an informal group of “champions” for the project who will be critical to the endorsement and implementation of the Tourism Master Plan upon completion.

**Deliverables**
- Stakeholder Engagement and SWOT Report

**Resident Survey**
- Develop and conduct an extensive survey of the region’s resident base regarding their views of tourism, its importance to the overall economy, and how their quality of life is impacted by San Diego tourism, tourism assets and experiences.

**Deliverables**
- Resident Engagement Report

### 5. Destination Benchmarking

**Key Activities**
- Identify direct competitive set and aspirational cities / destinations for destination benchmarking analysis.
- Review and assess budgets for selected destination marketing organizations.
- Collect and analyze new and creative use of sports, convention, conference, entertainment, festival, cultural, historic, natural, and other tourism assets to help drive optimal visitation to the destination; attendance mix (residents/visitors), financial performance, seasonality, and related information.
- Identify creative development and investment initiatives designed to build assets that can deliver positive benefits to San Diego’s economy, environment, and communities.
- Align benchmarked product portfolios with existing and planned San Diego products to understand gaps and opportunities to differentiate the destination.
- Review demographics, population shifts and trends to place market niches and opportunities in context (rac/sex, arts, outdoor recreation, cultural diversity, communities, local enterprises, connecting visitors to stewardship and restoration opportunities, etc.)

**Deliverables**
- Destination Benchmarking Report

### 6. Destination Branding, Marketing and Messaging Assessment

**Key Activities**
- The destination branding, marketing and messaging review will include a comprehensive assessment of how the brand is brought to life through communications, behavior, and engagement strategies including:
  - History and Background - The organization’s roots and the regional partners who contribute to promoting the riches of the area.
  - Industry Context - The bigger picture of travel, technology, and the factors that make people think - or think twice - about taking a trip to San Diego.
  - Sustainability and DEI - The risks and opportunities of the San Diego brand and marketing strategies related to destination stewardship principles including improving climate resiliency and equity, diversity, inclusion, and accessibility.
  - Target Audience - Descriptions and details of the traveler segments and personas who make up the target audience.
  - Reaching Each Audience - Details on how, where, why, and what the target markets care about when it comes to San Diego.

**Deliverables**
- Destination Branding, Marketing and Messaging Assessment Report
## 6. DESTINATION BRAND AND MARKETING AND MESSAGING ASSESSMENT

- Marketing Channel Strategies - Diving into each channel on what’s been working and plans to reach new eyeballs.
- Campaign Thought Starters and Co-Marketing Concepts - Themes used to reach the targets in ways that matter to them and how partnerships can amplify brand affinity.
- Resident Engagement - Efforts by San Diego Tourism Authority to engage residents in local activities / events and become champions for the region.
- Marketing Materials, Plans, and Rollout - The key assets used to tell others all about San Diego, when to deploy them, and how to grow optimally year over year based on metrics and successes.

### DELIVERABLES

- Destination Branding, Marketing and Messaging Assessment.

## 7. DESTINATION ASSESSMENT - DIVERSITY, EQUITY & INCLUSION

### KEY ACTIVITIES

- Coordinate with other TMP Tasks

### DELIVERABLES

- DEI Report

## 8. DESTINATION ASSESSMENT - SUSTAINABILITY

### KEY ACTIVITIES

- Conduct Sustainability Risk & Opportunity analysis assessing the above across economic, environmental, social, cultural impact areas to identify key challenges, performance to date, gaps, and opportunities for potential future action to improve sustainability including climate change resilience and equity.
- Starting at 5 days of onsite engagement, liaison with stakeholders
- Guided overview of the destination’s major areas of best practices, current sustainability achievements and risks
- Guided overview of select documented plans and policies coverage of GSTC Destination Criteria
- Preliminary results presentation by GSTC expert
- Concise Report outlining recommendations for overall sustainability improvement
- Summaries of the Report, which can be easily communicated to stakeholders, decision makers, community members, and target markets
- Marketing benefits, including media pieces distributed to GSTC global network

### DELIVERABLES

- Sustainability Report

## 9. SITUATIONAL ANALYSIS

### KEY ACTIVITIES

- Prepares situational analysis report and presentation deck

### DELIVERABLES

- Situational Analysis Report and Visioning Workshop Presentation Deck
10. VISIONING WORKSHOPS & DRAFT RECOMMENDATIONS

**KEY ACTIVITIES**
- Host and facilitate visioning workshops with destination stakeholders (includes prep)
- DraftTMP Recommendations
- Present to the Steering Committee for feedback, selection, and prioritization

**DELIIVERABLES**
- TMP Draft Recommendations for PBC Project Team and Steering Committee review and feedback

11. TOURISM MASTER PLAN

**KEY ACTIVITIES**
- Draft Tourism Master Plan
  - Articulate a 10-Year Vision for the City of San Diego tourism.
  - Present and prioritize a series of Tourism Master Plan Goals and Initiatives.
  - Identify key organizations and individuals that should be involved in the implementation process for each initiative, and their roles and responsibilities
  - Define the timeline for implementing each initiative, including near-term initiatives that can be pursued immediately, mid-term initiatives to target over a two-to-five-year period, and longer-term initiatives that may take several years of planning and development.
  - Define key performance metrics and measurement benchmarks for each initiative.
  - Create oversight committee to assess, direct, manage, and monitor TMP implementation
  - Present to PBC team and Steering Committee
- Collect and input feedback
- Finalize Tourism Master Plan
  - Provide graphic design of TMP according to PBC brand guidelines
  - Launch and present TMP to Industry Stakeholders, Government Leaders, and Community Groups
  - Work with PBC to socialize TMP
  - Conduct capacity-building sessions with champions / key stakeholder groups around behavior change solutions to support future implementation.

**DELIIVERABLES**
- Tourism Master Plan (Full Report and Executive Summary)

**PROJECT MANAGEMENT**
- PBC Project Meetings (Bi-Weekly)
- TMP Steering Committee Meetings (Monthly)
APPENDIX D
CERTIFICATION OF BUSINESS LOCATION
RFP NO. 23-104/LAC

In accordance with the Palm Beach County Local Preference Code, a preference may be given to: (1) proposers having a permanent place of business in Palm Beach County ("County"); or (2) proposers having a permanent place of business in the Glades that are able to provide the goods, services or construction to be utilized or built within the Glades. To receive a local preference, proposers must have a permanent place of business within the County or the Glades, as applicable, prior to the County’s issuance of any solicitation. A Business Tax Receipt which is issued by the Palm Beach County Tax Collector, authorizes the proposer to provide the goods/services to be purchased, and will be used to verify that the proposer had a permanent place of business prior to the issuance of the solicitation. The proposer must submit this Certification of Business Location ("Certification") along with the required Business Tax Receipt at the time of proposal submission. The Business Tax Receipt and this Certification are the sole determinant of local preference eligibility. Errors in the completion of this Certification or failure to submit this completed Certification will cause the proposer to not receive a local preference.

In instances where the proposer is exempt by law from the requirement of obtaining a Business Tax Receipt, the proposer must: (a) provide a citation to the specific statutory exemption; and (b) provide other documentation which clearly establishes that the proposer had a permanent place of business within the County or the Glades prior to the date of issuance of the solicitation. The County hereby retains the right to contact said proposer for additional information related to this requirement after the proposal due date.

I. Proposer is a:

Local Business: A local business has a permanent place of business in Palm Beach County.

(please indicate):

Headquarters located in Palm Beach County

Permanent office or other site located in Palm Beach County from which a vendor will produce a substantial portion of the goods or services.

Glades Business: A Glades business has a permanent place of business in the Glades.

(please indicate):

Headquarters located in the Glades

Permanent office or other site located in the Glades from which a vendor will produce a substantial portion of the goods or services.

II. The attached copy of proposer’s County Business Tax Receipt verifies proposer’s permanent place of business.

THIS CERTIFICATION is submitted by Richard Cutting-Miller, as Vice President, Tourism Strategy of CSL International, who hereby certifies that the information stated above is true and correct and that the County Business Tax Receipt is a true and correct copy of the original. Further, it is hereby acknowledged that any misrepresentation by the proposer on this Certification will be considered an unethical business practice and be grounds for sanctions against future County business with the proposer.

Richard Cutting-Miller
9/5/2023

(Signature) (Date)
CSL agrees to comply with the County’s Commercial Non-discrimination Policy as described in Resolution 2017-1770 as amended. Agreement is indicated by signature to the Price Proposal Page(s).
Legends Hospitality Holding Company, LLC
Update to credit considerations

Summary

New York City-based Legends' credit profile is constrained by its smaller revenue size relative to much larger hospitality and merchandising competitors and high financial leverage we expect will remain above 20x through 2024. Attendance and per-attendee spending at Legends' largest sites has recovered to or exceeded pre-pandemic levels in the LTM period ended 31 March 2023, resulting in strong revenue growth. However, the company remains free cash flow negative, reflecting internal investments and up-front costs associated with new business wins. A large proportion of revenue is concentrated in a few locations. Legends consulting and sales execution business lines offer arena planning, development, sponsorships and seat license sale services that provide business line diversity. Stadium development contracts with soccer clubs Real Madrid and FC Barcelona and NFL Buffalo Bills also support our revenue growth expectations. Stadium development fees are more profitable than the hospitality and merchandising business. Liquidity sources should ensure that Legends can fund operations, including in working capital, facility and inventory investments.

Table 1

We project financial leverage to decline as profit margins recover toward pre-pandemic levels
Credit strengths
- Concentrated but blue-chip brand customers under long term contracts
- Largest customers are among owners
- Highly variable cost structure and limited maintenance capital expenditure requirements provide operating leverage

Credit challenges
- High debt leverage
- Small food and merchandising revenue scale compared with its primary competitors
- Profit margins remain behind 2019 levels
- High, seasonal working capital needs typical of the food and merchandising businesses in which Legends operates.

Rating outlook
The stable outlook reflects our expectation for debt to EBITDA to decline to around 8.0 times, EBITA margins approaching 3%, and free cash flow to debt around -5%. The stable outlook also incorporates our anticipation that Legends will maintain good liquidity including high cash balances.

Factors that could lead to an upgrade
The ratings could be upgraded if we expect that Legends will sustain:
1. debt to EBITDA around 6 times;
2. free cash flow to debt about 5%;
3. good liquidity; and
4. balanced financial strategies.

Factors that could lead to a downgrade
The ratings could be downgraded if we anticipate:
1. revenue growth will stagnate and EBITA margins will remain narrow;
2. debt to EBITDA will remain over 8 times;
3. free cash flow will remain negative, leading to a diminished liquidity profile; or
4. more aggressive financial strategies featuring debt-financed acquisitions or shareholder returns.
Key indicators

<table>
<thead>
<tr>
<th>Key indicators</th>
<th>Legends Hospitality Holding Company, LLC</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>LTM</td>
</tr>
<tr>
<td>Revenue (in millions)</td>
<td>$1.5B</td>
</tr>
<tr>
<td>EBITDA Margin %</td>
<td>7.6%</td>
</tr>
<tr>
<td>Debt / EBITDA</td>
<td>2.9x</td>
</tr>
<tr>
<td>EBITDA / Interest Expense</td>
<td>2.7%</td>
</tr>
<tr>
<td>RCF / Net Debt</td>
<td>25.0%</td>
</tr>
</tbody>
</table>

All figures and ratios are calculated using Moody's estimates and standard adjustments. Moody's estimates ($) are Moody's opinion and do not represent the views of the issuer. 'n/a' means not applicable. Source: Moody's Investors Service estimates

Profile

Legends Hospitality Holding Company, LLC, headquartered in New York, New York, founded in 2008 by YGE Holdings, LLC, an affiliate of the New York Yankees, and Jones Concessions LP, an affiliate of the Dallas Cowboys, each of whom retains a large minority equity stake, and controlled by affiliates of Sixth Street Partners, LLC (Sixth Street) is a provider of food & beverage, merchandise and further complementary solutions, such as pre-construction feasibility studies, brand partnership sales and event-day hospitality services, to global sports brands, universities and tourist attractions.

Revenue for the LTM period ended 31 March 2023 was approximately $1.5 billion.
Detailed credit considerations

Revenue has surpassed pre-pandemic levels, though cash flow and leverage metrics remain pressured. Legends' revenue grew nearly 50% year-over-year in 2022, as it increased from approximately $760 million in 2021 to nearly $1.450 million, reflecting a recovery in live events and new arena development since business interruption caused by the COVID-19 outbreak starting in 2020. The revenue improvement was also significantly ahead of the company's FY2022 budget and our expectations, as nearly every venue and business segment beat expectations handily. We expect revenue to grow more modestly in FY 2023 and 2024, as coronavirus-related gains will cease as in-person events have returned to their normal, pre-pandemic levels.

While revenue has increased significantly, credit metrics, such as debt leverage and free cash flow, continue to be weak compared to many other issuers rated in the B3 category. We expect debt to EBITDA to decline toward 7.0x by the end of FY2024, but PK interest accruals will increase debt and somewhat offset EBITDA gains by the company, keeping financial leverage elevated. That being said, the company has shown a tendency to exhibit aggressive financial policies in the past, including through large capital outlays associated with new contract wins, which is industry-standard practice. Investment needs or acquisitions could result in further debt issuance that increases debt leverage. However, we do not currently expect any significant debt issuance or acquisitions in the next 12-18 months.

The credit profile is also pressured by our expectation for free cash flow to remain negative in 2023. This is largely due to the company's consistent investment in working capital, which reflects new business wins, and somewhat increased interest expense costs due to rising base interest rates. These two factors, alongside the low-margin nature of the business, restrict cash flow metrics on a forward-looking basis.

All financial metrics cited reflect Moody's standard adjustments.

Comprehensive hospitality product suite for sports & entertainment industry

Revenues are concentrated among top customers, such as the New York Yankees, Dallas Cowboys, Live Nation Entertainment, NFL SoFi Stadium (NFL Los Angeles Rams and Chargers), Ball Arena (NHL Colorado Avalanche and Denver Nuggets), Real Madrid and the One World Trade Center Observatory. However, concentration risk is mitigated by long-term contracts and ownership interests in Legends held by affiliates of the Yankees and Cowboys.

Legends was founded in 2008 by affiliates of the New York Yankees and the Dallas Cowboys as an in-venue hospitality provider. While the initial hospitality focus was on food, beverage remained the majority of revenues and the largest contributor of EBITDA for the company as it has grown and expanded clients over the last twelve years. Legends has solidified its competitive position by expanding its white-label product suite and merchandising capabilities to provide further value for clients. The company has also expanded to live events beyond sports and has used its sports business to grow a solutions business for experiential attractions, highlighted by its work at One World Trade Center Observatory.

Food and beverage hospitality remains the largest line of business offering for Legends. The company offers a full suite of outsourced premium F&B operations to a variety of sports and entertainment venues, from Yankee and AT&T Stadiums to Live Nation amphitheaters. Legends has a proven track record of growing revenue per attendee, referred to as per caps, substantially over the initial years of operations, which has led to a strong competitive position and new contract wins. Contracts are typically long-term, could require relatively large upfront capital investment, and are structured either as commission or management fee agreements, providing the company with reasonably predictable revenues and typically mitigated downside. The company additionally offers vertically integrated merchandising services from line development and production through distribution to live events on location sales and e-commerce solutions. The company believes that there is significant potential for international growth of these two segments, particularly with regard to European football (soccer) clubs.

The company also offers services through its global planning and global technology business offerings. With its global planning business, Legends provides pre-opening services including project feasibility studies, project management, and valuation of sponsorship assets within a property. Acting in an advisory capacity for venue owners in the pre-build and expansion phase, the global planning business puts Legends in the position to establish contact with venue owners and creates the potential for cross-selling opportunities.
The company's tech solutions, which include data analytics and digital development, are often sold alongside global planning solutions. These capabilities were further developed with its acquisition of 4Front in early 2022.

Legends provides a range of sale solutions through its smaller, but higher margin, global sales segment, providing offerings for collegiate and professional clients. Largely, this segment derives revenues and EBITDA through assisting organizations with the sale of premium and box seats, seat licensing agreements, and VIP event sales and tours to high-profile stadiums and locations. Similarly Legends provides services related to partnership sales including sponsorship valuation and sales execution for sponsorships, including naming rights. Revenues from these global partnership sales typically are long-term and stable.

Significant customer concentration is mitigated by strategic partnerships and minority owners. A significant portion of revenues and profits are derived from a handful of key accounts. While customer concentration is a credit concern, we believe that these concerns are largely mitigated from ownership considerations due to the long-term nature of contracts. We expect additional diversification of the client base via new business added over time. As noted above, affiliates of the Yankees and Cowboys founded Legends in 2008, and maintain large minority equity ownership stakes in the company, which mitigates the risks associated with those operations. Overall, more than 60% of EBITDA we expect the company to generate is contracted through 2030, which further mitigates risk associated with future operating performance.

ESG considerations
Legends Hospitality Holding Company, LLC's ESG Credit Impact Score is Highly Negative CIS-4

CIS-4

Highly Negative

For an issuer scored CIS-4 (Highly Negative), its ESG attributes are overall considered as having a discernible negative impact on the current rating. The negative influence of the overall ESG attributes on the rating is more pronounced compared to an issuer scored CIS-3.

Source: Moody's Investors Service

Legend's CIS-4 indicates the rating is lower than it would have been if ESG risk exposures did not exist. Legends utilizes aggressive financial policies, including a highly leveraged balance sheet, and may engage in debt-funded M&A as part of a strategy to bolster its organic growth prospects, which is typical of financial-sponsor-controlled companies. The company has moderate exposure to social risks including from a reliance on a large cadre of often-transitory low-skilled workers and food safety concerns.

ESG Issuer Profile Scores

**ENVIRONMENTAL**
- Moderately Negative

**SOCIAL**
- Moderately Negative

**GOVERNANCE**
- Highly Negative

Source: Moody's Investors Service

19 July 2022
Legends Hospitality Holding Company, LLC debt rating overview
Environmental
Legend's E-3 score reflects the fact that the nature of its food and merchandising activities have moderate exposure to physical climate risk, some emissions of pollutants and carbon and water usage, which results in moderate environmental risk.

Social
Legend's S-3 reflects moderate social risks, including pressure to maintain food safety and manage disease transmission risk which elevate customer relations risks. Demographic shifts in food service preferences since COVID could pressure revenue growth. The company maintains a large full and part time employee base with limited skills and could have a high rate of employee turnover.

Governance
Legend's G-4 reflects our expectations for aggressive financial policies, including the potential for debt-financed acquisitions and shareholder returns, and a board of directors controlled by its private equity owners.

Legend's E-3 score reflects moderate social risks, including pressure to maintain food safety and manage disease transmission risk which elevate customer relations risks. Demographic shifts in food service preferences since COVID could pressure revenue growth. The company maintains a large full and part time employee base with limited skills and could have a high rate of employee turnover.

ESG Issuer Profile Scores and Credit Impact Scores for the rated entity/transaction are available on Moodys.com. In order to view the latest scores, please click here to go to the landing page for the entity/transaction on MDC and view the ESG Scores section.

Liquidity analysis
We consider Legends' liquidity profile good. There was $95 million in cash as of 31 March 2023. We expect around $120 million of the $150 million revolving credit facility will be available to fund anticipated free cash flow deficits of about $30 million in 2023. We anticipate $30 million of the facility will continue to be used to issue letters of credit. Working capital is highly seasonal, with the first two fiscal quarters negative and the last two quarters positive. New contracts may require capital investments and start-up costs in advance of revenue being received. There are no debt maturities until 2025.

<table>
<thead>
<tr>
<th>Year</th>
<th>Revised Available</th>
<th>Cash</th>
</tr>
</thead>
<tbody>
<tr>
<td>2021</td>
<td>$400</td>
<td></td>
</tr>
<tr>
<td>2022</td>
<td>$350</td>
<td></td>
</tr>
<tr>
<td>2023 E</td>
<td>$300</td>
<td>$250</td>
</tr>
<tr>
<td>2024 E</td>
<td>$200</td>
<td>$150</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$100</td>
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<tr>
<td></td>
<td></td>
<td>$50</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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A financial covenant governing access to the revolver stipulates that Legends must comply with a 5.0 times maximum net secured leverage ratio, as defined in the facility agreement, which is applicable when revolver utilization exceeds 50% of commitments, or $75 million. We anticipate that Legends will be in compliance with the covenant if it is tested over the next 12 to 15 months.

Structural considerations
The B3 rating assigned to Legends' $400 million senior secured notes due 2026, in line with the company's B3 CFR, reflects the probability of default rating of B3-PD and a loss given default assessment of LGD3. In our waterfall of claims at default, the notes rank behind around $10 million of priority accounts payable from critical vendors and the unrated $150 million revolving credit facility.

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which is secured pari passu to the notes but has a liquidation preference over the notes, and ahead of the unrated $100 million senior unsecured PIK loan due 2027.

All debt instruments are issued by Legends Hospitality, LLC, a subsidiary of holding company Legends Hospitality Holding Company, LLC. The debt is guaranteed by entities generating 87% of Legends' revenues and 80% of EBITDA, per the company's calculation. Almost the entirety of non-guarantor EBITDA stems from operations located in One World Trade Center Observatory spaces leased from the Port Authority of New York and New Jersey (Aa3 negative) due to the lease terms.

Rating methodology and scorecard factors
Legends' 12-18 month scorecard-indicated outcome per Moody’s Business and Consumer Service Industry Rating Methodology dated June 2023 is B3, which is the same as the assigned B3 CFR.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Measure</th>
<th>Score</th>
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<tbody>
<tr>
<td>Revenue ($US B1B)</td>
<td>$1.46</td>
<td>B</td>
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<tr>
<td>Factor 2: Business Profile (20%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a) Demand Characteristics</td>
<td>B</td>
<td>B</td>
</tr>
<tr>
<td>Factor 3: Financial Policy (15%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a) EBITA Margin</td>
<td>2.0%</td>
<td>Ca</td>
</tr>
<tr>
<td>b) EBITA / Interest</td>
<td>12.1x</td>
<td>Ca</td>
</tr>
<tr>
<td>c) Interest Coverage</td>
<td>6x</td>
<td>Ca</td>
</tr>
<tr>
<td>d) Net Debt / EBITDA</td>
<td>0.8x</td>
<td>Ca</td>
</tr>
<tr>
<td>Factor 5: Financial Policy (15%)</td>
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<td></td>
</tr>
<tr>
<td>a) Financial Policy</td>
<td>B</td>
<td>B</td>
</tr>
</tbody>
</table>

Ratings

**LENDERS HOSPITALITY HOLDING COMPANY, LLC**

- **Outlook**: Stable
- **Corporate Family Rating**: B3
- **Senior Secured**: B3/LGD3

Source: Moody’s Investor Service

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18 July 2023

Legends Hospitality Holding Company, LLC Update for Credit Analysts
<table>
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<tr>
<th>Country</th>
<th>Phone</th>
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<tr>
<td>Americas</td>
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<tr>
<td>Asia Pacific</td>
<td>852-2551-9077</td>
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<td>81-3-5100-4700</td>
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<tr>
<td>China</td>
<td>86-21-7722-8454</td>
</tr>
</tbody>
</table>
REQUIRED APPENDICES
3.7 PRICE PROPOSAL INFORMATION

PROPOSED BUDGET

Total professional fees for any engagement will depend on the number of hours required to complete the project and skill levels of the assigned personnel. The following exhibit outlines the professional fees and expenses associated with the scope of work outlined in Section 3.3.

<table>
<thead>
<tr>
<th>Onsite</th>
<th>Virtual/Online</th>
</tr>
</thead>
</table>

1. PROJECT KICK-OFF AND PROJECT PLANNING

<table>
<thead>
<tr>
<th>KEY ACTIVITIES</th>
<th>CSL INTL</th>
<th>GDSM</th>
<th>TM</th>
<th>SANELSON</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perform kick-off meeting and orientation between CSL and PBC team</td>
<td>8</td>
<td>8</td>
<td>4</td>
<td>4</td>
<td>$11,200</td>
</tr>
<tr>
<td>Discuss roles and responsibilities and project requirements</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>$1,600</td>
</tr>
<tr>
<td>Collect secondary research, including existing customer research from appropriate sources</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>$2,200</td>
</tr>
<tr>
<td>Collect county, city, community and neighborhood research, reports, strategies etc. that might influence, feed into, or impact the Tourism Master Plan project</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>$700</td>
</tr>
<tr>
<td>Facilitate detailed project planning between CSL and PBC team to coordinate project timing and rollout for work plan activities</td>
<td>24</td>
<td>24</td>
<td>24</td>
<td>4</td>
<td>$97,600</td>
</tr>
<tr>
<td>Determine the ratings and traffic threshold to be applied for in-person destination assessment</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>$1,450</td>
</tr>
<tr>
<td>Conduct familiarization tour of destination and in-person review of selected venues</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>$1,450</td>
</tr>
<tr>
<td>Schedule periodic meetings and briefings for PBC team and TMP Steering Committee.</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>$3,200</td>
</tr>
</tbody>
</table>

DELIVERABLES
- Project Management Plan | $39,200 |

2. INITIAL STEERING COMMITTEE WORKSHOP

<table>
<thead>
<tr>
<th>KEY ACTIVITIES</th>
<th>CSL INTL</th>
<th>GDSM</th>
<th>TM</th>
<th>SANELSON</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meet and brief the TMP Steering Committee on Project Management Plan</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>$7,500</td>
</tr>
<tr>
<td>Introduce Subject Matter Experts and agree the depth of subject matter research</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>$7,500</td>
</tr>
<tr>
<td>Conduct TMP goals definition and priorities exercises</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>$3,050</td>
</tr>
</tbody>
</table>

DELIVERABLES
- Report on TMP Goals, Priorities and Focus | $30,500 |

3. LEVERAGING IMPORTANT PLANS AND RESEARCH

<table>
<thead>
<tr>
<th>KEY ACTIVITIES</th>
<th>CSL INTL</th>
<th>GDSM</th>
<th>TM</th>
<th>SANELSON</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review and analyze all relevant current travel and tourism studies and plans</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>$3,800</td>
</tr>
<tr>
<td>Review and analyze market and visitor data, studies, reports, and existing consumer research</td>
<td>2</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>$2,900</td>
</tr>
<tr>
<td>Collect and analyze reporting of global, national, and statewide consumer and travel and tourism research and trends</td>
<td>16</td>
<td>16</td>
<td>4</td>
<td>4</td>
<td>$5,600</td>
</tr>
<tr>
<td>Review and analyze all county, city, community and neighborhood research, reports, strategies plans, crisis management plans, workforce development plans, etc.</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>$5,600</td>
</tr>
<tr>
<td>Review cultural and inclusion initiatives to identify opportunities for cultural tourism development and improving diversity, equity, inclusion, and accessibility.</td>
<td>4</td>
<td>4</td>
<td>8</td>
<td>8</td>
<td>$2,800</td>
</tr>
</tbody>
</table>

DELIVERABLES
- Destination Research Report | $13,100 |

TOURISM ASSET REVIEW

<table>
<thead>
<tr>
<th>KEY ACTIVITIES</th>
<th>CSL INTL</th>
<th>GDSM</th>
<th>TM</th>
<th>SANELSON</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work with PBC and research providers to conduct a destination-wide assessment of tourism-related establishments, activities, and experiences</td>
<td>4</td>
<td>4</td>
<td>8</td>
<td>20</td>
<td>$8,500</td>
</tr>
</tbody>
</table>

DELIVERABLES
- Destination Asset Report | $8,500 |

TOTAL ACTIVITY TOTAL | $70,000 |
4. STAKEHOLDER AND RESIDENT ENGAGEMENT

**KEY ACTIVITIES**

- Review and agree on outline and questions for stakeholder engagement, as well as general guidelines for community survey, etc.
- Conduct a series of interviews and meetings with the destination's key stakeholders (tourism, travel, accommodation, and community stakeholders) to envision a forward-looking destination. Efforts will be undertaken to engage culturally diverse, underrepresented, and marginalized communities as well as cross-sector civil society organizations including environmental, social, and community-led groups.
- Identify participants' opinions, values, aspirations, priorities, and ideas for the future of the destination and tourism marketing in the destination and each of the major communities and neighborhoods.
- Build an informal group of "champions" for the project who will be critical to the endorsement and implementation of the Tourism Master Plan upon completion.

**DELIVERABLES**

- Stakeholder Engagement and SWOT Report
- Resident Engagement Report

5. DESTINATION BENCHMARKING

**KEY ACTIVITIES**

- Identify direct competitive set and aspirational cities/destinations for destination benchmarking analysis.
- Review and assess budgets for selected destination marketing organizations.
- Collect and analyze new and creative use of sports, convention, conference, entertainment, festivals, cultural, historic, natural, and other tourism assets to help drive optimal visitation to the destination attendance mix (residents/visitors); financial performance, seasonality, and related information.
- Conduct/evaluating initiatives that have led to sustainable increases in destination visitation and enhanced quality of life for residents.
- Identify creative development and investment initiatives designed to build assets that can deliver positive benefits to San Diego's economy, environment, and communities.
- Align benchmarked product portfolios with existing and planned San Diego product experiences.
- Review of demographics, population shifts and trends to place market niches and target audiences.
- Align benchmarked product portfolios with existing and planned San Diego product experiences.
- Identify competitive set and aspirational cities/destinations for destination benchmarking analysis.

**DELIVERABLES**

- Destination Benchmarking Report

6. DESTINATION BRANDING, MARKETING AND MESSAGING ASSESSMENT

**KEY ACTIVITIES**

- The destination branding, marketing and messaging review will include a comprehensive assessment of how the brand is brought to life through communications, advertising, and engagement strategies including:
- History and Background - The organization's roots and the regional partners who contribute to promoting the riches of the area.
- Brand Story - The driving force of what makes the brand unique, stand out, and the framework for how it stands and is positioned in the market.
- Marketing Vision - The direction of the marketing programs with the vision of the organization and the strategies and tactics to unify the plan.
- Sustainability and DEI - The risks and opportunities of the San Diego brand and marketing strategies related to destination stewardship principles, including improving climate resiliency and equity, diversity, inclusion, and accessibility.
- Industry Context - The bigger picture of travel, technology, and the factors that make people think - or think twice - about taking a trip to San Diego.
- Target Audience - Descriptions and details of the various segments and personas who are most apt to love the area as much as the locals do as well as support community priorities and destination stewardship goals.
- Reaching Each Audience - Details on how, where, why, and what the target markets care about when it comes to San Diego.
<table>
<thead>
<tr>
<th>DELIVERABLES</th>
<th>Onsite</th>
<th>Virtual/Online</th>
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<tr>
<td>4. DESTINATION MARKETING, MESSAGING AND ASSESSMENT (CONTINUED)</td>
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<tr>
<td>- Marketing Channel Strategies - Diving into each channel on what's been</td>
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<td>working and plans to reach new eyeballs.</td>
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<td>- Campaign Thought Starters and Co-Marketing Concepts - Themes used to</td>
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<td>reach the targets in ways that matter to them and how partnerships can</td>
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<td>amplify brand affinity.</td>
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<tr>
<td>- Resident Engagement - Efforts by San Diego Tourism Authority to</td>
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<tr>
<td>engage residents in social activities / events and become champions for</td>
<td></td>
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<tr>
<td>the region.</td>
<td></td>
<td></td>
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<tr>
<td>- Marketing Materials, Plans, and Rollout - The key assets used to tell</td>
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<tr>
<td>others all about San Diego, when to deploy them, and how to grow</td>
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<td>optimally year over year based on metrics and successes.</td>
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<tr>
<td>- Destination Branding, Marketing and Messaging Assessment</td>
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</table>

| 2. DESTINATION ASSESSMENT - DIVERSITY, EQUITY & INCLUSION                  |        |                |
| KEY ACTIVITIES                                                             |        |                |
| - Coordinate with other TMP Tasks                                           |        |                |
| DELIVERABLES                                                                |        |                |
| - DEI Report                                                               |        |                |

| 6. DESTINATION ASSESSMENT - SUSTAINABILITY                                 |        |                |
| KEY ACTIVITIES                                                             |        |                |
| - Conduct Sustainability Risk & Opportunity analysis assessing the above    |        |                |
|   across economic, environmental, social, cultural impact areas to        |        |                |
|   identify key challenges, performance to date, gaps, and opportunities    |        |                |
|   for potential future action to improve sustainability including climate   |        |                |
|   change resilience and equity.                                            |        |                |
|   - Steering at 5 days of onsite engagement, liaison with stakeholders    |        |                |
|   - Guided overview of the destination's major areas of best practices,    |        |                |
|   current sustainability achievements and risks                            |        |                |
|   - Guided overview of select documented plans and policies coverage of    |        |                |
|   GSTC Destination Criteria                                                |        |                |
|   - Preliminary results presentation by GSTC expert                        |        |                |
|   - Concise Report outlining recommendations for overall sustainability     |        |                |
|   improvement                                                                |        |                |
|   - Summaries of the report, which can be easily communicated to           |        |                |
|   stakeholders, decision makers, community members, and target              |        |                |
|   markets                                                                  |        |                |
| - Marketing benefits, including media pieces distributed to GSTC global    |        |                |
|   network                                                                  |        |                |
| DELIVERABLES                                                                |        |                |
| - Sustainability Report                                                    |        |                |

| 9. SITUATIONAL ANALYSIS                                                    |        |                |
| KEY ACTIVITIES                                                             |        |                |
| - Prepare situational analysis report and presentation deck                |        |                |
| DELIVERABLES                                                                |        |                |
| - Situational Analysis Report and Visioning Workshop Presentation Deck      |        |                |

| 10. VISIONING WORKSHOPS & DRAFT RECOMMENDATIONS                              |        |                |
| KEY ACTIVITIES                                                              |        |                |
| - Host and facilitate visioning workshops with destination                  |        |                |
|   stakeholders (includes prep)                                              |        |                |
|   - Draft TMP Recommendations                                               |        |                |
|   - Present to the Steering Committee for feedback, selection, and         |        |                |
|     prioritization                                                          |        |                |
| DELIVERABLES                                                                |        |                |
| - TMP Draft Recommendations for PBC Project Team and Steering Committee     |        |                |
|   review and feedback                                                       |        |                |

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<th>GDSM</th>
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11. TOURISM MASTER PLAN

**KEY ACTIVITIES**

- Draft Tourism Master Plan
  - Articulate a 10-Year Vision for the City of San Diego tourism.
  - Present and prioritize a series of Tourism Master Plan Goals and initiatives.
  - Identify key organizations and individuals that should be involved in the implementation process for each initiative, and their roles and responsibilities
  - Define the timeline for implementing each initiative, including near-term initiatives that can be pursued immediately, mid-term initiatives to target over a two-to-five year period, and longer-term initiatives that may take several years of planning and development.
  - Define key performance metrics and measurement benchmarks for each initiative.
  - Create oversight committee to assess, direct, manage, and monitor TMP implementation

- Present to PBC team and Steering Committee
  - Collect and input feedback
  - Finalize Tourism Master Plan
  - Provide graphic design of TMP according to PBC brand guidelines
  - Launch and present TMP to Industry Stakeholders, Government Leaders, and Community Groups
  - Work with PBC to socialize TMP
  - Conduct capacity-building session(s) with champions / key stakeholder groups around behavior change solutions to support future implementation.

**DELIVERABLES**

- Tourism Master Plan (Full Report and Executive Summary)

**PROJECT MANAGEMENT**

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**TOTAL PROFESSIONAL FEES**

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**OTHER EXPENSES**

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**TOTAL BUDGET**

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<td>$700,000</td>
<td>75.4%</td>
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Note: Estimated Travel (12%)
Professional fees for the Tourism Master Plan project are set at $491,550 plus out-of-pocket expenses for travel, printing, etc. estimated at $58,986. The total project budget is set at $550,536. All fees and expenses will be billed and are payable monthly.

Should additional work or travel be requested beyond the scope of services detailed herein, professional fees will be billed on an hourly rate basis and additional out-of-pocket expenses will be billed at cost. We would be happy to discuss with Palm Beach County potential adjustments to the scope of services to best meet any requirements that you may have for this study.

Please note that Task 12 - Implementation Advisory Services IS NOT included in the Proposed Budget but would be proposed at a later date once Palm Beach County determines what specific activities and services would be helpful to assist in the implementation of the Tourism Master Plan.

We look forward to discussing our proposal with the Palm Beach County project team and thank you for your consideration.
APPENDIX A
PRICE PROPOSAL PAGES
RFP NO. 23-104/LAC

Page 1 of 2

The following pricing is submitted as the all inclusive pricing to provide the Tourism Development Council with a Tourism Master Plan in accordance with the Requirements/Scope of Work/Services set forth in this RFP document.

TOTAL PROPOSED PRICE: $550,536

The Proposer certifies by signature below the following:

a. This pricing is current, accurate complete, and is presented as the Total Pricing, including "out-of-pocket" expenses (if any), for the performance of this Contract in accordance with the Requirements/Scope of Work/Services of this RFP.

b. This Proposal is current, accurate, complete, and is presented to the County for the performance of this Contract in accordance with all the requirements as stated in this RFP.

c. The Proposal is submitted without prior understanding, agreement, or connection with any corporation, firm, or person submitting a Proposal for the same materials, services, and supplies and is, in all respects, fair and without collusion or fraud.

d. The financial stability to fully perform the terms and conditions as specified herein. The County reserves the right to request financial information from the proposer at any time during the solicitation process and in any form deemed necessary by the County.
APPENDIX A
PRICE PROPOSAL PAGES
RFP NO. 23-104/LAC

Page 2 of 2

e. The information in Section 3.5 Commercial Non-Discrimination Certification is true and correct to the best of the Proposer's knowledge.

f. There are no legal proceedings required to be disclosed, as required by Section 3.5 Commercial Non-Discrimination, except as disclosed in Proposer's proposal, if any.

Note: Failure to certify and submit the required information, if applicable, shall deem your proposal non-responsive.

IMPORTANT: FAILURE TO SUBMIT THESE PAGES, INCLUDING ALL REQUIRED INFORMATION AND SIGNATURES, WILL BE CAUSE FOR "IMMEDIATE REJECTION" OF THE ENTIRE PROPOSAL RESPONSE.

NAME (PRINT): Richard Cutting-Miller
TITLE: Vice President, Tourism Strategy
COMPANY: CSL International
ADDRESS: 61 Broadway, Suite 2400
CITY/STATE/ZIP: New York, NY 10006
TELEPHONE NO.: 646-338-0300
SIGNATURE: Richard Cutting-Miller
Full Legal Name of Entity: Conventions Sports & Leisure International LLC

Entity Address: 61 Broadway, Suite 2400, New York, NY 10006

Form of Entity:
[ ] Corporation
[ X ] Limited Liability Company
[ ] Partnership, General
[ ] Partnership, Limited
[ ] Joint Venture
[ ] Sole Proprietorship

Federal I.D. Number: 45-3340743

(1) If Proposer is a subsidiary, state name of parent company.

Caution: All information provided herein must be as to Proposer (subsidiary) and not as to parent company.

(2) Is Entity registered to do business in the State of Florida? Yes [X] No [ ]

If yes to the above, as of what date? 11/5/2013

If not presently registered with the Division of Corporations to do business in the State of Florida as either a Florida or foreign corporation, Proposer acknowledges, by signing below, that if it is the Awardee it will register with the State of Florida prior to the effective date of the contract with Palm Beach County.

SIGNATURE: Richard Cutting-Miller

NAME (PRINT): Richard Cutting-Miller

TITLE: Vice President, Tourism Strategy

COMPANY: CSL International
## OEBO Schedule 1

**Section A**

**PLEASE LIST THE DOLLAR AMOUNT OR PERCENTAGE OF WORK TO BE COMPLETED BY THE PRIME CONTRACTOR/CONSULTANT ON THE PROJECT**

**NAME OF PRIME RESPONDENT/BIDDER:** CSL International  
**ADDRESS:** 61 Broadway, Suite 2400, New York, NY 10006  
**PHONE NO.:** 646-338-2500  
**E-MAIL:** RCutting-Miller@csil.com  

**PRIME’S DOLLAR AMOUNT OR PERCENTAGE OF WORK:** 75.4%  

1. **NAME OF PRIME RESPONDENT/BIDDER:**  
2. **NAME OF CONTACT PERSON:** Richard Cutting-Miller  
   **PHONE NO.:** 646-338-2500  
   **E-MAIL:** RCutting-Miller@csil.com  

**Section B**

**PLEASE LIST THE DOLLAR AMOUNT OR PERCENTAGE OF WORK TO BE COMPLETED BY ALL SUBCONTRACTORS/SUBCONTRACTORS ON THE PROJECT BELOW:**

<table>
<thead>
<tr>
<th>Subcontractor/Subconsultant Name</th>
<th>DOLLAR AMOUNT OR PERCENTAGE OF WORK</th>
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<tr>
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<td>Total 7.2%</td>
</tr>
<tr>
<td><strong>Tourism Diversity Matters</strong></td>
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</tr>
<tr>
<td><strong>San Nelson and Associates</strong></td>
<td>Total 7.2%</td>
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</tbody>
</table>

**Total Bid/Offer Price:** $491,550 (Professional Fees Only)  
**Total Certified S/M/WBE Participation:** $35,600 (Prof Fees Only)

I hereby certify that the above information is accurate to the best of my knowledge:  
**Vice President, Tourism Strategy:** Richard Cutting-Miller

---

### Notes:
1. The amount listed on this form for a subcontractor/subconsultant must be supported by price or percentage listed on the properly executed Schedule 2 or attached signed proposal.
2. Only those firms certified by Rhode Island County at the time of solicitation due date are eligible to meet the established OEBO Affirmative Procurement Initiative (API). Please check the applicable box below the dollar amount or percentage under the appropriate demographic category.
3. Modification of this form is not permitted and will be rejected upon submission.

---

**REVISED:** 09/22/2022
A completed Schedule 2 is a binding document between the Prime Contractor/consultant and a Subcontractor/subconsultant (for any tier) and should be treated as such. The Schedule 2 shall contain bolded language indicating that by signing the Schedule 2, both parties recognize this Schedule as a binding document. All Subcontractors/subconsultants, including any tiered Subcontractors/subconsultants, must properly execute this document. Each properly executed Schedule 2 must be submitted with the bid/proposal.

SOLICITATION/PROJECT NUMBER: RFP NO. 23-104-LAC
SOLICITATION/PROJECT NAME: Tourism Master Plan Consultant

Prime Contractor: CSL International
Subcontractor: Global Sustainable Tourism Council® (GSTC®)

[Check box(s) that apply]
☐ SBE  ☐ WBE  ☐ MBE  ☐ M/WBE  ☐ Non-S/M/WBE

Date of Palm Beach County Certification (if applicable): __________

The undersigned affirms they are the following (select one from each column if applicable):

<table>
<thead>
<tr>
<th>Column 1</th>
<th>Column 2</th>
<th>Column 3</th>
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<tbody>
<tr>
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<td>☐ Female</td>
<td>☐ African-American/Black</td>
</tr>
<tr>
<td>☐ Hispanic American</td>
<td>☐ Native American</td>
<td></td>
</tr>
</tbody>
</table>

S/M/WBE PARTICIPATION - S/M/WBE Primes must document all work to be performed by their own workforce on this form. Failure to submit a properly executed Schedule 2 for any S/M/WBE participation may result in that participation not being counted. Specify in detail, the scope of work to be performed or items supplied with the dollar amount and/or percentage for each work item. S/M/WBE credit will only be given for the areas in which the S/M/WBE is certified. A detailed proposal may be attached to a properly executed Schedule 2.

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The undersigned Subcontractor/subconsultant is prepared to self-perform the above-described work in conjunction with the aforementioned project at the following total price or percentage: ______________________

If the undersigned intends to subcontract any portion of this work to another Subcontractor/subconsultant, please list the business name and the amount below accompanied by a separate properly executed Schedule 2.

Price or Percentage: ______________________

Name of 2nd/3rd tier Subcontractor/subconsultant: ______________________

CSL International
Print Name of Prime
Richard Cutting-Miller
By: ___________________________________________
Authorized Signature
Richard Cutting-Miller
Print Name
Vice President, Tourism Strategy
Title
Date: 9/5/2023

Global Sustainable Tourism Council
Print Name of Subcontractor/subconsultant
By: ___________________________________________
Authorized Signature
Randy Durband
Print Name
CEO
Title
Date: 21 August 2023

Revised 09/17/2019

85
OEBO LETTER OF INTENT – SCHEDULE 2

A completed Schedule 2 is a binding document between the Prime Contractor/consultant and a Subcontractor/subconsultant (for any tier) and should be treated as such. The Schedule 2 shall remain binding language indicating that it includes the Schedule 2 form details require this section as a binding document. All subcontractors/subconsultants, including any tiered subcontractors/subconsultants, must properly execute this document. Each properly executed Schedule 2 must be submitted with the bid/proposal.

SOLICITATION/PROJECT NUMBER: RFP NO. 23-104-LAC

SOLICITATION/PROJECT NAME: Tourism Master Plan Consultant

Prime Contractor: CSL International
Subcontractor: S.A. Nelson and Associates

The undersigned affirms they are the following (select one from each column if applicable):

Column 1

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</tbody>
</table>

S/M/WBE PARTICIPATION – S/M/WBE Primes must document all work to be performed by their own work force on this form. Failure to submit a properly executed Schedule 2 for any S/M/WBE participation may result in that participation not being counted. Specify in detail, the scope of work to be performed or items supplied with the dollar amount and/or percentage for each work item. S/M/WBE credit will only be given for the areas in which the S/M/WBE is certified. A detailed proposal may be attached to a properly executed Schedule 2.

<table>
<thead>
<tr>
<th>Line Item</th>
<th>Item Description</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Contingencies/</th>
<th>Total Price/Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Project Management and Consulting</td>
<td>35,600</td>
<td>1</td>
<td></td>
<td>35,600 /7.2%</td>
</tr>
</tbody>
</table>

The undersigned Subcontractor/subconsultant is prepared to self-perform the above-described work in conjunction with the aforementioned project at the following total price or percentage:

<table>
<thead>
<tr>
<th>Name of 2nd/3rd Tier Subcontractor/subconsultant</th>
<th>Price or Percentage:</th>
</tr>
</thead>
</table>

If the undersigned intends to subcontract any portion of this work to another Subcontractor/subconsultant, please list the business name and the amount below accompanied by a separate properly executed Schedule 2.

<table>
<thead>
<tr>
<th>CSL International</th>
<th>S.A. Nelson and Associates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print Name of Prime</td>
<td>Print Name of Subcontractor/subconsultant</td>
</tr>
<tr>
<td>by: Richard Cutting-Miller</td>
<td>by: non-signature</td>
</tr>
<tr>
<td>Authorized Signature</td>
<td>Authorized Signature</td>
</tr>
<tr>
<td>Print Name</td>
<td>Print Name</td>
</tr>
<tr>
<td>Richard Cutting-Miller</td>
<td>S.A. Nelson and Associates</td>
</tr>
<tr>
<td>Title</td>
<td>Title</td>
</tr>
<tr>
<td>Vice President, Tourism Strategy</td>
<td>Date: 9/5/2023</td>
</tr>
</tbody>
</table>

Revised 09/17/2019
OEBO LETTER OF INTENT — SCHEDULE 2

A completed Schedule 2 is a binding document between the Prime Contractor/consultant and a Subcontractor/subconsultant (for any tier) and should be treated as such. The Schedule 2 shall contain bolded language indicating that by signing the Schedule 2, both parties recognize this Schedule as a binding document. All Subcontractors/subconsultants, including any tiered Subcontractors/subconsultants, must properly execute this document. Each properly executed Schedule 2 must be submitted with the bid/proposal.

SOLICITATION/PROJECT NUMBER: RFP NO. 23-104-LAC

SOLICITATION/PROJECT NAME: Tourism Master Plan Consultant

Prime Contractor: CSL International Subcontractor: Tourism Diversity Matters

<table>
<thead>
<tr>
<th>(Check box(s) that apply)</th>
<th>Date of Palm Beach County Certification (if applicable):</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ SBE □ WBE □ MBE □ Non-S/M/WBE</td>
<td>--------------------------------------------------------</td>
</tr>
</tbody>
</table>

The undersigned affirms they are the following (select one from each column if applicable):

<table>
<thead>
<tr>
<th>Column 1</th>
<th>Column 2</th>
<th>Column 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Male</td>
<td>□ Female</td>
<td>□ African-American/Black □ Asian American □ Caucasian American □ Hispanic American □ Native American</td>
</tr>
</tbody>
</table>

S/M/WBE PARTICIPATION — S/M/WBE Primus must document all work to be performed by their own work force on this form. Failure to submit a properly executed Schedule 2 for any S/M/WBE participation may result in that participation not being counted. Specify in detail, the scope of work to be performed or items supplied with the dollar amount and/or percentage for each work item. S/M/WBE credit will only be given for the areas in which the S/M/WBE is certified. A detailed proposal may be attached to a properly executed Schedule 2.

<table>
<thead>
<tr>
<th>Line Item</th>
<th>Item Description</th>
<th>Unit Price</th>
<th>Quantity/Units</th>
<th>Contingencies/Allowances</th>
<th>Total Price/Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Tourism DEI Assessment</td>
<td>40,700</td>
<td>1</td>
<td></td>
<td>40,700 / 9.1%</td>
</tr>
</tbody>
</table>

The undersigned Subcontractor/subconsultant is prepared to self-perform the above-described work in conjunction with the aforementioned project at the following total price or percentage:

| Price or Percentage: | 40,700 / 9.1% |

If the undersigned intends to subcontract any portion of this work to another Subcontractor/subconsultant, please list the business name and the amount below accompanied by a separate properly executed Schedule 2.

<table>
<thead>
<tr>
<th>Name of 2nd/3rd tier Subcontractor/subconsultant</th>
<th>Price or Percentage:</th>
</tr>
</thead>
</table>

CSL International

Print Name of Prime

Richard Cutting-Miller

Authorized Signature

Richard Cutting-Miller

Print Name

Vice President, Tourism Strategy

Title

Date: 9/5/2023

Tourism Diversity Matters

Print Name of Subcontractor/subconsultant

Greg DeShields

Authorized Signature

Greg DeShields

Print Name

Executive Director, Tourism Diversity Matters

Title

Date: 8/20/2023

Revised 09/17/2019

85
THANK YOU

FRISCO OFFICE
One Cowboys Way
Suite 325
Frisco, TX 75034
cslnt.com | 602.294.2000

MINNEAPOLIS OFFICE
520 Nicolet Mall
Suite 520
Minneapolis, MN 55402
cslnt.com | 602.294.2000

NEW YORK OFFICE
61 Broadway
Suite 2400
New York, NY 10006
cslnt.com | 602.294.2000
EXHIBIT C
AFFIRMATIVE PROCUREMENT INITIATIVES ("API”s) FOR PROFESSIONAL SERVICES CONTRACTS
Contract No. 23-104/LAC

The API(s) approved for this project is listed below.

SBE Evaluation Preference for SBE Prime Respondents (Contracts less than $500,000) (Ordinance 2-80.27 (3)(d) Option 1)

**Up to 15 Points (up to 15% of the total evaluation points) are available to SBE prime respondents**

An SBE Evaluation Preference of up to 15 percent (15%) of the total number of available evaluation points for scoring of proposals shall be reserved for SBE prime respondents or bidders on County Professional Services Contracts valued at less than $500,000.
**ACORD CERTIFICATE OF LIABILITY INSURANCE**

- **Client #: 1638760**
- **LEGENHOS2**

**COVERAGE**

<table>
<thead>
<tr>
<th>CERTIFICATE NUMBER:</th>
<th>REVISION NUMBER:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1TRENY170133851902</td>
<td>01/01/2024 01/01/2024</td>
</tr>
<tr>
<td>81045753195</td>
<td>01/01/2024 01/01/2024</td>
</tr>
<tr>
<td>1TRENY170133852102</td>
<td>01/01/2024 01/01/2024</td>
</tr>
</tbody>
</table>

**DESCRIPTION OF OPERATIONS/LOCATIONS/VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**

The General Liability policy includes an automatic Additional Insured endorsement that provides Additional Insured status to the Certificate only when there is a written contract that requires such status, and only with regard to work performed by or on behalf of the named insured. The Workers Compensation policy provides a Blanket Waiver of Subrogation when required by written contract, except as prohibited by law. Umbrella follows form over the General Liability Policy.

**CERTIFICATE HOLDER**

- **Palm Beach County Board of County Commissioners Insurance Compliance**
- **P.O. Box 100085 - DX**
- **Duluth, GA 30096**

**AUTHORIZED REPRESENTATIVE**

**ACORD 25 (2016/03)**

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#S43692460/M43691629

NDNZP
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Master Plan
Tourism
Tourist Development Council
Palm Beach County
**About the TDC**

**Mission:** To lead the promotion of tourism in Palm Beach County by empowering collaborative partnerships, advocating appropriate destination defining developments, and ensuring the steady growth of visitors.

**Vision:** Palm Beach County will be a globally recognized destination that all travelers will want to visit and experience because of its culture, lifestyle and amenities.

The Palm Beach County Tourist Development Council (TDC) was established by the Board of County Commissioners (BCC) in 1981 to be the advisory board to the BCC and all things tourism. In 1982 the BCC enacted its first tourist development tax, referred to as "bed tax" which is levied on all overnight stays up to six months in duration.

The TDC is tasked with managing contracts and overseeing the operations of four marketing agencies, four tourism-related facilities, as well as beach renourishment:

- Discover The Palm Beaches
- Cultural Council for Palm Beach County
- Palm Beach County Sports Commission
- Palm Beach County Film & Television Commission

- Cacti Park of the Palm Beaches
- Roger Dean Chevrolet Stadium
- Palm Beach County Convention Center
- Palm Beach County Convention Center Garage
We Know

**Palm Beach County**

- **The Destination**
  2,300 Miles, 39 Cities/Towns, 7 Districts

- **Diverse Tourism Assets**
  MLB, PGA, Equestrian, Shopping, Luxury Hotels

- **Diverse Visitor Base**
  Families, High-End, Adventurers, Day-Trippers

- **World Class Brand**
  The Palm Beaches

- **Ecotourism**
  47 miles of coast, Everglades, Parks & Rec.
Palm Beach County’s Tourism Industry Is Soaring

Palm Beach County welcomed a record number 9.5 million visitors in 2023 generating an economic impact of $10.3 billion to the economy, resulting in a record number $84 million in bed taxes collected in FY23.
RFP 23 – 104/LAC Tourism Master Plan

- April 12, 2018, original recommendation of $250,000 for Tourism Master Plan

- August 03, 2023, issued RFP for Tourism Master Plan

- Three proposals received: Resonance, Conventions, Sports, & Leisure, & MMGY NexFactor
Tourism Strategy and Subject Matters Experts

CSL PROJECT TEAM

CSL
- RICHARD CUTTING-MILLER
- JOHN KAUTZ
- SCOTT ERICKSON
- TYLER OTHEM

TDM
- LARRY A. RICE
- MAGGIE E. GRAYTON

GSTC
- RANDY DURHAM
- KATHLEEN PITTMAN

SA. NELSON
- SOPHIE NELSON
- ERSETE CUTTAN

Global Sustainable Tourism Council
CSL Knows Florida

- Destination Strategies
- Convention Centers
- Sports & Entertainment Venues
- Stadiums & Arenas
- Recreation Facilities
- Equestrian Venues
- Tourism Attractions
Phase

ESTABLISHING A FOUNDATION

Tactics

Project Kick-Off & Planning

Initial Steering Committee Workshop

Leveraging Important Plans & Research
Phase 2
STAKEHOLDER & RESIDENT ALIGNMENT

Tactics

- Stakeholder & Resident Engagement
- Destination Benchmarking
- Destination Branding, Marketing, & Messaging Assessment
Tactics

- Diversity Assessment – Diversity, Equity, Inclusion, & Accessibility
- Destination Assessment - Sustainability
- Situational Analysis
Phase
TREND FORWARD, STAKEHOLDER ALIGNMENT, MEASURABLE STRATEGIC PLAN

Tactics

- Workshops
- Tourism Master Plan
- 20-year plan for economic growth